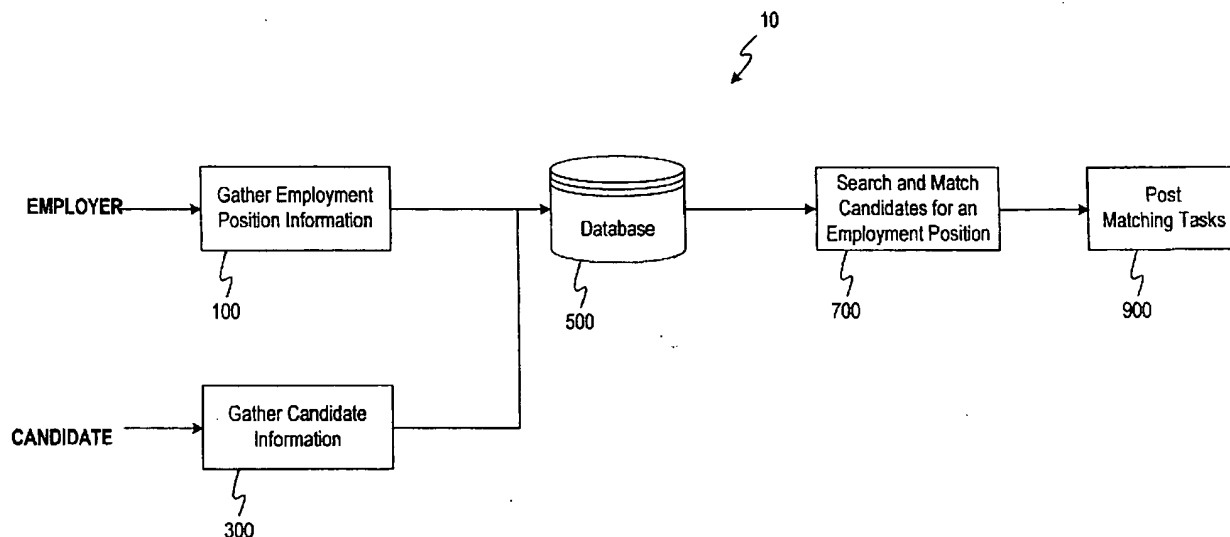




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(54) **METHODE ET SYSTEME D'APPARIEMENT D'UN OU DE PLUSIEURS CANDIDATS A UN EMPLOI AU MOYEN DE PARAMETRES D'EVALUATION QUALITATIFS ET QUANTITATIFS**
(54) **METHOD AND SYSTEM FOR MATCHING ONE OR MORE CANDIDATES WITH AN EMPLOYMENT POSITION USING QUALITATIVE AND QUANTITATIVE ASSESSMENT PARAMETERS**



(57) A computer system and process for matching one or more candidates with an employment position of an employer is provided. The computer system includes a processor and a database accessible to the processor. The processor is programmed to: retrieve employment parameters from the database; retrieve candidate parameters from the database; compare the candidate parameters with the employment parameters; and compute the degree of correspondence between the candidate parameters and the employment parameters.

ABSTRACT

A computer system and process for matching one or more candidates with an employment position of an employer is provided. The computer system includes a processor and a database accessible to the processor. The processor is programmed to:

- retrieve employment parameters from the database;

- retrieve candidate parameters from the database;

- compare the candidate parameters with the employment parameters; and

- compute the degree of correspondence between the candidate parameters and the employment parameters.

**METHOD AND SYSTEM FOR MATCHING ONE OR MORE
CANDIDATES WITH AN EMPLOYMENT POSITION USING
QUALITATIVE AND QUANTITATIVE ASSESSMENT PARAMETERS**

FIELD OF THE INVENTION

The present invention relates generally to candidate recruiting. More particularly, it concerns a computer system and method for matching candidates with employment positions using qualitative and quantitative assessment parameters.

BACKGROUND OF THE INVENTION

Traditionally, companies have located and hired employees using two methods: recruiting firms and classified advertisements. Recruiting firms provide a popular and effective method for hiring employees because they are able to attract and have access to a much wider pool of candidates than the company would itself. Furthermore, by using a recruiting firm, the company does not have to expend its own time and resources, which can be considerable, evaluating each candidate,

Recruiting firms generally operate by collecting resumes from candidates. While the universe of potential candidates is limitless, especially in the area of middle to upper level management, traditional methods (including networking and advertising) still only provide the recruiting firm with a narrow cross-section of candidates who are qualified based only on quantifiable factors.

When a recruiting firm receives a candidate's resume, it is entered or scanned into the firm's database. Because a recruiting firm has no practical way of updating a candidate's personal information, a large percentage of a firm's database becomes outdated and virtually useless within a short period of time. Therefore, the firm must constantly attract new candidates.

When a candidate search is initiated, the recruiter will search its database using single or multiple "keywords" in order to generate a group of candidates who are qualified based on quantitative factors such as experience or education. This method is limited in that a recruiter can only pull up those resumes which contain the exact search word or words that are entered. For example, a resume stating that the candidate has experience in "programming" and "desktop publishing" will not be pulled-up if the employer is searching for candidates with "C++" and "Quark" experience. Furthermore,

once a qualified group of candidates is identified, recruiters use subjective criteria to assess the qualitative factors such as whether the candidate will fit with the company's organizational culture.

When a recruiter determines that a candidate is qualified, the recruiter will then meet with the candidate, and if appropriate, will arrange for an interview with the employer. The recruiter will generally negotiate the terms of employment. A typical recruiting firm may take up to six months to complete a candidate search, with the majority of time spent locating and assessing candidates. This can be a significant drain on a company if the position is vacant during that period.

Newspaper classifieds are another type of recruitment tool. An employer generally places an ad in the newspaper and gives an address or number, to which a candidate can respond. While this method may be less expensive than using a recruiting firm, the employer must spend a great deal of its time and resources sorting through resumes and interviewing candidates who respond, many of whom will not be qualified or of equal importance, and/or fit within the company's organizational culture. Furthermore, the potential candidate pool is limited to the readers of the specific publication.

Over the past several years, Internet companies such as CareerMosaic.com, Monster.com, JobTrak.com, and HotJobs.com have utilized the World Wide Web to provide a new method of locating and hiring employees. These Internet career sites generally operate by providing an on-line searchable database of resumes and job openings, which can be submitted and updated at-will. Many of these sites resemble little more than electronic versions of the classified ads: employers pay to list job openings while candidates search the openings for free. With the connectivity of the Internet, finding resumes quickly and keeping information current has made the traditional databases in recruiting firms obsolete. The challenge has now become focused on accessing (mining) and assessing the data.

Similar to traditional firms, these Internet sites are generally only searchable using a keyword method, which can be highly ineffective with the millions of resumes that need to be evaluated. Furthermore, once a person is identified as a qualified candidate based on quantitative factors, these Internet companies do not provide any way

to evaluate the essential qualitative factors which are equally as important in ensuring a person is right for the job position. Much like using classified ads, employers must use their own time and resources sorting through resumes and assessing candidates. A functional diagram of a typical prior art Internet career site system is illustrated in FIG. 1.

5 Such a system generally includes a website display, a computer server connected to the Internet, and a database.

Therefore, there is a need for a system and method of using a wide area network, such as the Internet, to provide a recruiting service accessibility to candidates and employers around the world, in addition to the ability to update and provide information
10 at will. There is also a need for a recruiting service that can search a database using a plurality of parameters to better match qualified candidates with a particular employment position based on quantitative factors. There is also a need for a system and method that allows candidates to be assessed based qualitative factors. There is also a need for an automated system and method for screening and matching qualified candidates with
15 employment positions based on quantitative and qualitative parameters.

SUMMARY OF THE INVENTION

The present invention overcomes the challenges of candidate recruiting by providing a system and method for matching one or more candidates with an employment position of a company based on the assessment and evaluation of
20 quantitative and qualitative parameters. Quantitative parameters can include such items of information as the salary, geographic location, and degree requirements associated with a given employment position. Likewise, quantitative parameters can also include a given candidate's job category, and employer. Qualitative parameters include job challenges, operating styles, role styles, leadership styles, motivations, business
25 environment experience, *etc.*

In one embodiment, the computer system includes a processor and a database accessible to the processor. The processor is programmed to:

- Retrieve employment parameters from the database;
- Retrieve candidate parameters from the database;
- 30 • Compare the candidate parameters with the employment parameters; and

- Compute the degree of correspondence between the candidate parameters and the employment parameters.

According to one embodiment, a method and system employing a qualitative assessment tool is used to match candidates to an employment position taking into account qualitative characteristics of importance to the employer. According to some embodiments, computer implemented versions of such a method and/or system are provided. According to some embodiments, such computer implemented methods and/or systems use the Internet.

According to one embodiment of the present invention, various parameters are collected and stored in a database. For example, a record can be set up for each employment position. Each record can contain a set of employment position parameters defining certain required or desired characteristics for the employment position. Employers can define these employment position parameters based on desired or required characteristics and background. Likewise, candidates enter information and parameters, which are stored in a database. Parameters associated with a given candidate can be organized into a candidate record. The database may contain a number of candidate records associated with a number of candidates and a number of employment position records associated with a number of employment positions. Then a matching process may be performed to match one or more candidate records to a given employment position record by comparing some or all of the parameters associated with each candidate record to some or all of the parameters associated with the given employment position. In this way, candidates can be matched to employment positions.

According to some embodiments, the employment position records and the candidate records include both "quantitative" parameters and "qualitative" parameters.

According to some embodiments of the present invention, one or more candidate records can be matched to a given employment position record based on comparisons of associated quantitative and/or qualitative parameters.

BRIEF DESCRIPTION OF THE DRAWINGS

Other objects and advantages of the invention will become apparent upon reading the following detailed description and upon reference to the accompanying drawings, in which:

FIG. 1 is a diagram illustrating a typical prior art Internet recruiting process;

FIG. 2 is a diagram of an overview of one embodiment of the present invention;

FIG. 3 is a flow diagram illustrating a process for setting up an employer and/or employment position;

5 FIG. 4 is a flow diagram illustrating a process for specifying employment position parameters;

FIGs. 5a-5g provide example screens used for specifying employer required and/or desired quantitative employment parameters;

FIGs. 6a-6p provide example screens used for specifying employer required
10 and/or desired qualitative employment parameters;

FIG. 7 is a flow diagram related to ensuring that employment position parameters have been completely specified and preparing an employment position record for a matching process;

FIG. 8 is a flow diagram related to gathering candidate parameter information
15 according to one embodiment of the present invention;

FIGs. 9a-9j provide example screens used for obtaining quantitative candidate parameters;

FIGs. 10a-10x provide examples of screens for obtaining qualitative candidate parameters;

20 FIGs. 11a-11b illustrate a flow diagram related to determining whether a candidate record has been completed;

FIGs. 12a-12c illustrate examples of employer qualitative assessment feedback screens;

FIGs. 13a-13e illustrate examples of candidate qualitative assessment feedback
25 screens;

FIG. 14 is a flow diagram related to the identification of incomplete candidate records, the notification of candidates having incomplete records, and the completion of such records;

FIG. 15 is a flow diagram illustrating an example of a method of employing a
30 database containing employment position and candidate records to identify a desired number of qualified candidates for the position;

FIG. 16 is a flow diagram illustrating the matching function according to one embodiment of the present invention;

FIG. 17 is a flow diagram of an embodiment of the responsibilities matching subroutine of FIG. 16;

5 FIG. 18 is a flow diagram of an embodiment of the challenges matching subroutine of FIG. 16;

FIGs. 19a and 19b illustrate a flow diagram of an embodiment of the industry matching subroutine of FIG. 16;

10 FIG. 20 is a flow diagram of an embodiment of the company matching subroutine of FIG. 16;

FIG. 21 is a flow diagram of an embodiment of the company size matching subroutine of FIG. 16;

FIG. 22 is a flow diagram of an embodiment of the company classification matching subroutine of FIG. 16;

15 FIG. 23 is a flow diagram of an embodiment of the experience matching subroutine of FIG. 16;

FIGs. 24a-24b illustrate a flow diagram of an embodiment of the degree matching subroutine of FIG. 16;

20 FIG. 25 is a flow diagram of an embodiment of the certification matching subroutine of FIG. 16;

FIG. 26 is a flow diagram of an embodiment of the qualitative assessment matching subroutine of FIG. 16;

FIGs. 27a-27c illustrate a table showing an embodiment of the scoring subroutine of FIG. 16; and

25 FIGs. 28a-28b are flow diagrams of an embodiment of the matching subroutine of FIG. 16.

DESCRIPTION OF ILLUSTRATIVE EMBODIMENTS

30 The present invention combines the best attributes of traditional recruiting firms and Internet career sites to produce a new system and method for mining and assessing candidate data. This invention uses the speed and connectivity of the Internet, which

provides accessibility to anyone in the world and allows candidates to update their information at will. It also allows a recruiter to search a database using a complex series of algorithms to mine qualified candidates based on multiple parameters and to match candidate profiles with a company's needs. In addition, the invention provides an
5 assessment tool to evaluate qualitative factors such as whether the candidate will fit the specific organizational culture of the company. Since one of the most important factors in successfully placing a candidate with a company is ensuring that the company's corporate culture is matched with an individual's management style and personality, this invention can dramatically reduce turnover. This invention also provides an essential
10 recruiting tool for today's information based society. Further, this invention significantly reduces the amount of time spent locating a qualified candidate and therefore drastically reduces the amount of overall time spent on a candidate search by, for example, 50 to 60%.

The present invention provides a system and method that automatically screens
15 candidates based on quantitative and qualitative characteristics so that employer resources are not wasted interviewing candidates who do not fit the organizational culture of the company.

FIG. 2 provides a functional overview of one embodiment of the present invention. There, a system 10 for matching candidates with available employment
20 positions is shown. Information from employers regarding available employment positions and information from candidates is gathered and stored in a database such as database 500. The gathering of information from an employer about an employment position is represented by block 100. The information gathered during the employer input phase can include employer position parameters such as the education, experience,
25 compensation, employment position location, and industry experience required and/or desired. In addition, the specific skills required, the employer's qualitative assessment, and the employer's weightings for each parameter are entered. Some embodiments for the collecting of employment position parameters are described in more detail below in connection with FIGs. 4-7.

30 Likewise, information from a number of candidates is gathered and stored in a database such as database 500. The database 500 may comprise one or more databases.

For example, one database may be used to store the candidate data, while another database stores the employer data, *etc.* The gathering of information from a candidate is represented by block 300. The information gathered during the candidate input phase can include candidate parameters such as the candidate's education, employment history, prior experience, present employer, current position, desired position, desired geographic location, and qualitative assessment parameters. Some embodiments for collecting candidate parameters are described in more detail below in connection with FIGs. 8-11.

Then, for a particular employment position, a matching process is employed whereby the candidate information stored in the database 500 is searched in an effort to locate one or more candidates whose associated information matches the employment parameters for the particular employment position at issue. The searching and matching process is represented by block 700. During the matching process, candidate information is compared with the employment parameters entered by the employer for the available position. According to some embodiments, a degree of correspondence between the information provided by a particular candidate and the employment parameters is then computed. The system 10 may then provide information regarding the results of the matching process by, for example, generating a list including a number of candidates and the degree of correspondence between each candidate and the employment parameters associated with the employment position at issue. The degree of correspondence between the employment parameters and the parameters associated with each candidate may then be reviewed, for example, by the recruiter or the search consultant who initiated the particular matching process. Depending on the results of the search, one or more modified searches may be additionally performed.

Additional post-matching tasks may be performed to further assess the appropriateness of the candidates found suitable for the particular employment position. This post-matching activity is represented by block 900. This post-matching activity may include manual post-matching tasks performed by the employer and/or search consultant such as telephone interviews, video conferences, personal interviews, negotiations, and eventually placement of a qualified candidate in the employment position.

According to some embodiments of the present invention, an Internet based recruiting system is provided. According to such embodiments, the entity operating a recruiting server sets up the system so that an employer can enter on-line employment position parameters associated with an employment position which the employer would
5 like to have filled. The recruiting server may comprise one or more interconnected servers. For example, one server may be used to run the website, while another server performs the processing functions described herein. The entity operating the recruiting server can be, for example, a recruiting or search firm. Likewise, the server can be set up so that candidates can enter detailed information about themselves on-line. The server
10 can also be set up so that individual websites are established for each employer and/or candidate. Likewise, the server may provide for individual websites for each employment position to be filled. Accordingly, a given employer may have a number of websites residing on the server. Access to these individual websites may be secured to prevent unauthorized persons from accessing them. Security may be provided, for
15 example, by requiring a password or authorization code to be entered before a given individual website can be accessed.

FIG. 3 illustrates a process for setting up an individual employment position website so that an employer may enter information associated with a new employment position to be added to the system. In the embodiment shown in FIG. 3, the server is
20 maintained by a recruiting firm. According to this embodiment, a search consultant enters the recruiting website, as represented by block 108. The search consultant then selects an existing client (an employer) from a menu of existing clients or enters a new employer (block 110). Each employer can have an associated identification number. For new employers, either the system generates or the search consultant designates such an
25 employer identification code or number when a new employer is specified. Next, an engagement is selected or created, *i.e.*, the available employment position is entered by the search consultant, as shown in block 112. Each employment position can also have an associated engagement code or number that is generated, for example, by the system or designated by the search consultant. Accordingly, a specific employment position
30 website may have both a client code and an engagement code associated with it. Alternatively, a specific employment position website may be identified solely by a

single code, such as an engagement code, without the need for a client code. In block 114, the search consultant enters the name of each user at the employer that will be permitted to enter information regarding the selected engagement or employment position. In embodiments where individual websites are secured via a password, the search consultant can specify the password or passwords to be used. In block 116, the search consultant provides the employer with the user identification code or codes and the associated passwords for entering a particular employment position website.

FIG. 4 illustrates an embodiment for inputting employment position parameters via an individual employment position website such as one created in the manner described above in connection with FIG. 3. A registered employer logs onto the recruiting server by entering, for example, the company name at the employer website (block 118). Where the employer website requires a password(s) to gain access to the recruiting server, the employer first enters the appropriate password(s). The employer then enters the desired engagement number, *i.e.*, the desired employment position to be filled. Next, the employer enters various desired and/or required employment position parameters for the employment position (block 120). The employment parameters may include candidate education, certification, work experience, present employer classification, *etc.*, along with the employer's position opening, employment position location, and employer qualitative assessment parameters. The employment parameters are stored in a database such as database 500.

As used herein, the term "qualitative assessment" includes organizational cultural assessment, job profile assessment and conjoint analysis. The term "qualitative assessment" refers to how a candidate fits in with a company's organizational culture. Such an assessment includes personality type matching between candidates and companies. One such assessment is The Myers Briggs Personality Type system, which has sixteen different personality types. In one embodiment, the qualitative assessment tool of the present invention assesses parameters such as a candidate's job challenges, operating styles, role styles, leadership styles, motivations, business environment experience, *etc.* Similarly, the employer's organization and operating style are evaluated with respect to parameters such as company and position challenges, company operating style, leadership style, company motivations, fast growth business culture, rapidly

changing business environment, *etc.* The qualitative assessment tool of the present invention assesses candidates and job positions and matches candidates to a job position where the company culture matches the candidate's personal traits. The qualitative assessment tool measures candidates' and employers' decision making styles, thinking
5 styles, cognitive motives, achievement motives, emotional styles, career concepts, and career motives. Therefore, according to one embodiment, the qualitative assessment tool seeks to match the career challenges and responsibilities of potential candidates with the expectations and organization of a particular company.

In one embodiment, the qualitative assessment uses questionnaires derived from
10 the book by MICHAEL J. DRIVER, KENNETH R. BROUSSEAU & PHILLIP L. HUNSAKER, THE DYNAMIC DECISION MAKER: FIVE DECISION STYLES FOR EXECUTIVE AND BUSINESS SUCCESS, (Self Discovery Press 1998). In another embodiment, the qualitative assessment uses conjoint analysis questionnaires derived from tools such as ACQNET adaptive conjoint analysis provided by dataDirect, which is a subsidiary of Kingsley
15 Research, Inc. of New York, NY, in cooperation with Sawtooth Software, Inc. of Sequim, WA.

FIGs. 5a-5g provide example employer screens that are used in connection with specifying required and/or desired quantitative employment parameters such as the employer's position description, the position's scope of activities, the industry
20 experience required, the industry experience desired, *etc.* The employer selects the parameters he/she thinks are important for the available position and assigns a weight to each parameter, as shown in FIG. 5g.

FIGs. 6a-6p provide example employer screens that are used in connection with specifying the employer's required and/or desired qualitative assessment parameters.
25 These parameters include job challenges, operating styles, role styles, leadership styles, motivations, business environment experience, *etc.* The employer selects the qualitative parameters he/she thinks are important for the available position and assigns a weight to each parameter, as shown in FIGs. 6b-p. FIGs. 6c-6p illustrate example employer screens that are used in connection with obtaining qualitative information from an
30 employer that enables the system to perform an organizational cultural assessment of the employer and job position.

FIG. 7 is a flow diagram related to ensuring that employment position parameters have been completely specified and preparing an employment position record for a matching process. In the embodiment shown in FIG. 7, a search consultant enters the recruiting website and selects the proper employer and the engagement number
5 corresponding to the position to be filled, as shown in block 122. The search consultant determines whether the employment position record is complete, as shown in block 124. If it is not complete, the employer is contacted to complete the employment questionnaire, as shown in block 126. If the employment questionnaire is complete, the search consultant reviews the employer's responses to the employment questionnaire, as
10 shown in block 128.

In block 132, the search consultant determines whether there are any employer dispersion problems, *i.e.*, differences in what various users feel are important parameters for the particular position. For example, if the human resource manager indicated that communication was an important parameter (*e.g.*, gave this parameter 7/7) and the
15 manager over the position indicated that communication was of low importance (*e.g.*, gave this parameter 1/7), the search consultant would talk with each manager to understand why this parameter was weighed differently by each user and, based on these conversations, overwrite the entry such that the appropriate weight is given this parameter. Thus, if dispersion problems are discovered, the dispersion problems are
20 resolved by adjusting the input parameters, such as the qualitative assessment parameters for the organization, as shown in block 130.

If there are no dispersion problems, or once these problems are resolved, the system 10 generates a preliminary report detailing the job profile generated for the employment position, as shown in block 136. This report is reviewed with the employer
25 to evaluate whether there are any discrepancies or problems with the profile, *i.e.*, whether the job profile is an accurate representation of the qualities the employer desires in a candidate (block 140). In other words, does the candidate profile include what the pertinent managers in the company regard as desirable or required candidate traits such as the proper amount of work experience, from a company of sufficient size or prestige,
30 from the proper position within that company, along with the proper education, certification, compensation, career motivations, company organizational culture fit, and

decision making style. If there are such discrepancies or problems with the report, then blocks 130, 136, 140 and 142 may be repeated until all such problems are resolved.

Otherwise, the employment position record is made available for matching, as shown in block 144.

5 Turning now to FIG. 8, a flow diagram related to gathering candidate parameter information according to one embodiment of the present invention is illustrated. In the embodiment shown in FIG. 8, the candidate enters a recruiting website to register with a recruiting firm on-line, as illustrated in block 204. A questionnaire comprising a series of registration screens is provided to obtain information from the candidate such as the
10 candidate's name, e-mail address, current home address, current phone number, education, employment history, prior experience, present employer, current position, desired position, desired geographic location, *etc.* According to some embodiments, the questionnaire also includes a candidate qualitative assessment, which he/she answers on-line. Likewise, according to some embodiments, the qualitative assessment includes a
15 conjoint analysis tool, which the candidate also takes on-line. The results of these assessments and/or analyses, along with the other registration information, are stored to the database 500 as candidate parameters.

FIGs. 9a-9j and FIGs. 10a-10x provide example candidate screens that are used in connection with obtaining information from a candidate regarding his/her quantitative
20 and qualitative parameters, respectively. Such quantitative parameters, illustrated in FIGs. 9a-9j, include the candidate's name, address, telephone number, desired position, current level, academic background and certifications, employment history, geographic preferences, compensation, *etc.* Such qualitative parameters include the candidate's skills, business environment experience, and answers to a qualitative assessment tool, as
25 illustrated in FIGs. 10a-10x. FIGs. 10c-10o provide example candidate screens that are used in connection with obtaining qualitative information from a candidate that enables the system to perform a organizational cultural assessment of the candidate. FIGs. 10p-10x provide example candidate screens that are used in connection with obtaining qualitative information from a candidate that enables the system to perform a conjoint
30 analysis of the candidate.

Referring again to FIG. 8, upon entering information into the database 500, the submitted candidate information may be organized into a candidate record. After a candidate record has been created, the system can periodically determine whether the record is complete, *i.e.*, whether the candidate completed all or at least the minimum required information (see *e.g.*, FIGs. 11a-b). For example, after a candidate exits the recruiting website, the system can determine whether the candidate provided all requested information such as by, for example, answering all questions posed in the questionnaires. For example, the candidate information in-take process represented by block 204 may permit the user to complete all or only portions of the questionnaires during any given visit. In this manner, information can be stored to the database as it is provided by a candidate without requiring the candidate to complete the entire in-take process during a single visit. Accordingly, a particular candidate can visit the recruiting website and begin entering information, exit the website, and then return one or more times to complete the in-take process.

According to some embodiments, when a candidate initially enters some information into the system 10, the system can be designed to create an individual website for that individual candidate. Such individual candidate websites can be provided with security features such as associated passwords. When an individual candidate website is created, an associated website identification code(s) and password can be assigned to the website and provided to the candidate. For example, the identification code could comprise a candidate's name. Accordingly, after exiting the recruiting website, a candidate may return to his or her individual website by entering his or her name and the appropriate password at the recruiting website.

If the candidate did not complete all the required in-take information, the candidate can be prompted to complete the registration process, as illustrated in block 210 (see *e.g.*, FIG. 14). Methods of prompting the candidate include posting notices to the candidate on the candidate's individual candidate website, e-mailing the candidate, *etc.* Once the candidate completes the entire registration process, all the information is stored to the database 500 and made available for processing by the system 10, as shown in block 212. For example, the complete candidate record may be made available for matching searches, as discussed below. According to some embodiments, the system

permits even incomplete candidate records to be made available for limited processing by the system 10. For example, if the candidate completed all the questionnaires relating to the candidate's quantitative parameters, the system 10 could determine whether the candidate at least had the required degree and experience for the employment position. If
5 the quantitative parameters were met, the employer or search consultant could then determine whether it would be beneficial to contact the candidate to obtain further information related to the candidate's qualitative parameters.

Upon completing the in-take process, the responses to the questionnaires are analyzed and the results of such analysis are stored in the database 500. For example,
10 based on a candidate's responses to questions posed by a qualitative assessment tool, qualitative candidate parameters can be determined and stored to be database. The qualitative assessment tool is discussed in more detail in connection with FIGs. 10a-10x above and 13a-13f below. According to some embodiments, the qualitative candidate parameters are made available to the candidate, as represented by the candidate feedback
15 block 213 of FIG. 8. For example, the results can be e-mailed to the candidate or the results can be made available on-line at the candidate's individual candidate website for subsequent retrieval by the candidate. In one embodiment, the results are communicated to the candidate in about 24 hours.

FIGs. 11a and 11b illustrates a flow diagram related to determining whether a
20 candidate record has been completed and determining various qualitative candidate parameters. In the embodiment shown in FIGs. 11a,b, the system 10 determines whether the candidate qualitative assessment questionnaires are complete, as shown in block 220. If they are not complete, in block 211, the candidate is prompted to complete the questionnaires. In one embodiment, the candidate is prompted to complete the
25 qualitative assessment questionnaires by the methods mentioned above (*i.e.*, posting notices to the candidate on the recruiting website, e-mailing the candidate, *etc.*). In another embodiment, an appropriate incomplete flag is set. In either embodiment, the system next moves to block 226. Otherwise, when the assessment questionnaires are complete, the system 10 determines the candidate's qualitative assessment from the
30 responses to the questionnaires, as shown in block 222.

One method of determining the candidate's qualitative assessment, including an organizational cultural assessment, is detailed in MICHAEL J. DRIVER, KENNETH R.

BROUSSEAU & PHILLIP L. HUNSAKER, THE DYNAMIC DECISION MAKER: FIVE DECISION STYLES FOR EXECUTIVE AND BUSINESS SUCCESS, (Self Discovery Press 1998). Several

5 companies offer qualitative assessment tools, including: Hogan Assessment System, Inc. of Tulsa, Oklahoma; TTI Performance Systems, Ltd. of Scottsdale, Arizona; Waldroop Butler Associates of Brookline, Massachusetts; and Winslow Research Institute, of San Mateo, California (The Winslow Behavioral Assessment System). The following factors have been found to be relevant in selecting an appropriate qualitative assessment tool
10 from the many available:

- Generation of scores that are consistent both over time and interrater
- Scoring based on input from the individual to be evaluated without the need for additional input from others (*e.g.*, without input from others evaluating the candidate)
- 15 • The focus of the assessment tool, with a preference for those with a primary focus on the selection and matching of candidates to jobs
- Availability of the test in foreign languages
- Validity of the results
- 20 • The clarity of the feedback, with a preference for tools providing numerical results over those in which the feedback is entirely textual
- The length of time needed to complete the test, with a preference for tests requiring less time
- The extent to which the test is perceived to be valid by those taking it (facial validity).

25 For example, the system 10 determines various qualitative candidate parameters, such as candidate problem solving skills, decision making skills, task performance proficiency, interpersonal skills, leadership skills, motives, operating styles, cultural fit, *etc.*, on a scale indicating the candidate's disposition for each parameter. In one

embodiment, the system 10 represents the candidate's proficiency for each candidate qualitative assessment parameter graphically on a scale indicating where the candidate falls on the scale for each parameter. Example candidate and/or employer qualitative assessment feedback screens illustrating candidate proficiency at several evaluated parameters are shown in FIGs. 13a-13e.

For example, the candidate's proficiency for problem solving is rated from very action-oriented, to moderately action oriented and analytic, to very analytic. Similarly, the candidate's proficiency for task performance is rated from very persistent, to moderately persistent and flexible, to very flexible. Likewise, the candidate's proficiency at interpersonal skills is evaluated from very directive, to moderately directive and collaborative, to very collaborative. Other parameters are evaluated similarly by the system 10.

Then, the candidate's profile, comprised of candidate parameters, is stored to the database 500, as shown in block 224 of FIG. 11a. In block 225, the system 10 provides the candidate with feedback by, for example, updating the candidate's homepage on the recruiting website with the qualitative assessment information calculated in block 222.

In block 226 of FIG. 11b, the system 10 determines whether the candidate conjoint analysis questionnaires are complete. If it is not complete, in block 211, the candidate is prompted to complete the questionnaires by, *e.g.*, posting notices to the candidate on the recruiting website, e-mailing the candidate, *etc.* or setting an appropriate incomplete flag and moving back to block 220. Otherwise, when the conjoint analysis questionnaire is complete, the system 10 processes the candidate's conjoint analysis based on the questionnaire responses, as shown in block 228. A conjoint analysis forces a candidate to choose between two different options. For example, the candidate is first asked to choose between options A and B. Next, the candidate is asked to choose between options B and C, and so on. Example conjoint analysis questions are shown in FIG. 10p-x. The outcome of this analysis helps to determine whether the candidate shares the same professional motivating factors with a certain employer and a certain position by evaluating the candidate's behavioral traits. An example of a commercially available conjoint analysis tool is the ACQNET adaptive conjoint analysis provided by dataDirect, which is a subsidiary of Kingsley Research, Inc. of New York, NY, in

cooperation with Sawtooth Software, Inc. of Sequim, WA. Conjoint analysis is described in several publications, including: SUSAN M. SHERIDAN, THOMAS R. KRATOCHWILL, & JOHN R. BERGAN, CONJOINT BEHAVIORAL CONSULTATION: A PROCEDURAL MANUAL (APPLIED CLINICAL PSYCHOLOGY); JORDAN J. LOUVIERE, 5 ANALYZING DECISION MAKING: METRIC CONJOINT ANALYSIS (QUANTITATIVE APPLICATIONS IN THE SOCIAL SCIENCES, No 67) (1988); CONJOINT ANALYSIS: A GUIDE FOR DESIGNING AND INTERPRETING CONJOINT STUDIES/044 (1992); DAVID B. MONTGOMERY, CONJOINT CALIBRATION OF THE CUSTOMER/COMPETITOR INTERFACE IN INDUSTRIAL MARKETS (REPORT No 85 112) (1985); SAS® TECHNICAL REPORT R-109, 10 CONJOINT ANALYSIS EXAMPLES (1993); RICHARD P. BAGOZZI, ADVANCED METHODS OF MARKETING RESEARCH (Blackwell Publishing); and JOE CURRY, UNDERSTANDING CONJOINT ANALYSIS IN 15 MINUTES (Quirk's Marketing Research Review), all of which are incorporated herein by reference in their entirety. See Appendix A and Appendix B for conjoint analysis examples.

15 The candidate's conjoint analysis results are then stored to the database 500, as shown in block 230 of FIG. 11b. In block 234, the system 10 provides candidate feedback by, for example, updating the candidate's homepage on the recruiting website with the conjoint analysis information calculated in block 228.

In the embodiment where an incomplete flag is set, once the process of FIGs. 20 11a,b is completed, an appropriate reminder is sent to the candidate by posting notices to the candidate on the candidate's homepage on the recruiting website, e-mailing the candidate, *etc.* If no incomplete flags are set, then a complete record flag is set indicating that the candidate's record is available for full matching.

FIG. 14 is a flow diagram related to the identification of incomplete candidate 25 records, the notification of candidates having incomplete records, and the completion of such records. In the embodiment shown in FIG. 14, the system 10 generates reports on incomplete candidate profiles, as shown in block 236. The system 10 can then generate a reminder e-mail to all candidates having an incomplete profile, as shown in block 238. Additionally or alternatively, the system 10 generates an individual reminder e-mail to 30 each candidate having an incomplete profile, as shown in block 240. Additionally or alternatively, the system 10 generates a promotional offer on the recruiting website to

each candidate having an incomplete profile to return to the website and complete his/her registration profile, as shown in block 242. For example, one promotional offer is an on-line subscription to a new service. The candidate may re-enter the recruiting website to compete his/her incomplete profile, as shown in block 244. The candidate then
5 completes the candidate questionnaire screens and the system 10 accepts the candidate's responses to the candidate questionnaire, as shown in block 248. According to some embodiments, the candidate's responses are stored to the database 500 after each screen is completed.

FIG. 15 is a flow diagram illustrating an example of a method of employing a
10 database containing employment position and candidate records to identify a desired number of qualified candidates for the position. In the embodiment shown in FIG. 15, a search consultant enters the recruiting website and enters the employer identification number and the desired engagement number, as illustrated in block 302. The search consultant then selects the matching function from the menu on the website, as shown in
15 block 304. The search consultant then reviews the weights of the employment parameters, as determined previously by employer, as shown in block 306. These weights were assigned according to their importance to the position being filled. The employment parameters include education, desired/required certifications, desired/required degrees, experience (by function, position, and/or number of years of
20 experience), position opening, compensation, employer location, desired company size, desired company, desired classification of company, desired/required industry, employer qualitative assessment (job profile and cultural fit), career challenges, and responsibilities (skill match) parameters.

The system 10 then prompts the employer to select a subset of the search
25 parameters identified above, if desired, as shown in block 307. In this way, the search consultant can focus the search to emphasize certain of the parameters. The system 10 then performs a matching function in block 308, which is described in more detail in relation to FIGs. 16-28b below. Next, the search consultant reviews the output from the matching function (*e.g.*, the list of the top 50 candidates), as shown in block 310. He/she
30 can then review, print-out or bookmark the matching candidates, as shown in block 312. FIGs. 12a-12c and 13a-13d illustrates example screens showing how one example

candidate compares to the employment position parameters. This report may be reviewed with the employer to evaluate whether the candidate's qualities match what the employer requires and/or desires in a candidate.

In block 314, the search consultant decides whether enough qualified candidates were found by the matching function, block 308. If there were, the matching candidates and their corresponding parameters are noted, printed-out or bookmarked, as shown in block 316. If not enough qualified candidates were found, the search consultant decides what parameters to manipulate to net more candidates, as shown in block 318. As shown in block 320, the number of candidates retrieved from the database 500 can be adjusted, e.g., from 50 to 500 candidates. Additionally or alternatively, the search consultant may redefine the position restrictions and execute another database search, as shown in block 322. Additionally or alternatively, the search consultant may re-search the database 500 by targeting the candidate's desired position, or the candidate's actual work experience, or both, as shown in block 324. Additionally or alternatively, the search consultant may review and/or override the employer's original employment parameter weighting, as shown in blocks 326 and 306. Then, the search can be re-run (block 308). The loop comprising blocks 308, 310, 312, 314, 318, 320, 322, 324, and/or 326 may be repeated until enough qualified candidates are found.

The matching function of block 308 of FIG. 15 is shown in more detail in FIG. 16. In the embodiment shown in FIG. 16, the system 10, in block 330, compares the employment responsibilities with the responsibilities of each candidate in the database 500 (see FIG. 17). In block 332, the system 10 compares the employment challenges (as identified by the employer) with the challenges identified by each candidate in the database 500 (see FIG. 18). Next, the required/desired industry to be targeted by the employer is compared with the industry in which each candidate in the database 500 works, as shown in block 334 (see FIGs. 19a and 19b).

The system 10 then compares the specific company from which to hire the candidate (as identified by the employer) with the company in which each candidate in the database 500 works, as shown in block 336 (see FIG. 20). In block 338, the system 10 compares the required/desired company size with the size of the company in which each candidate in the database 500 works (see FIG. 21). The system 10 next compares

the required/desired company classification with the company classification of the company where each candidate in the database 500 works, as shown in block 340 (see FIG. 22). The system 10, in block 342 and 343, compares the required/desired work experience with the work experience of each candidate in the database 500 (see FIG. 23).

5 The system 10 then compares the required/desired degree with the degree of each candidate in the database 500, as shown in block 344 (see FIGs. 24a and 24b). Next, the system 10 compares the required/desired professional certification with the professional certification, if any, of each candidate in the database 500, as shown in block 346 (see FIG. 25). The system 10 compares the employer's qualitative assessment parameters
10 with the qualitative assessment results of each candidate in the database 500, as shown in block 348 (see FIG. 26).

The system 10 then applies, in block 350, the employment parameter weights and computes the degree of correspondence between the candidate information for each candidate and the employment parameters, as shown in the scoring table illustrated in
15 FIGs. 27a-c. In one embodiment, the system 10 computes the degree of correspondence between each employment parameter and each corresponding candidate parameter. A parameter comparison value is calculated for each parameter. In one embodiment, the degree of correspondence for each parameter is represented by a number between 0 and 100, 100 being a perfect match. The system 10 then calculates, for each candidate, a
20 candidate matching value based on the parameter comparison values. In one embodiment, the parameter comparison values for each parameter are summed and adjusted according to the parameter weights assigned by the employer. For example, if the employer weighed ten parameters equally (*i.e.*, 10 points each), a candidate with 80 points for a particular parameter would have an adjusted score of 8 points. All the
25 adjusted point totals for the ten parameters would then be summed and the resulting total would be the candidate's score (matching value). The degree of correspondence (matching value) for each candidate is stored in the database 500.

All of the matching steps need not be completed for each candidate. Rather, candidate records can be eliminated as inadequate matches are found. For example, if
30 the employment position is a marketing job at a pharmaceutical company and several candidates listed their desired position as an associate attorney in a private law firm,

those candidates are eliminated after evaluating the desired position parameter match. Similarly, if the employment position required a college degree and several candidates had no college degree, those candidates are eliminated after evaluating the education parameter match.

5 FIG. 17 illustrates an embodiment of a responsibilities matching process of block 330 of FIG. 16 in more detail. There, skill parameters refer to employee skills such as working in a fast growth business, in a rapidly changing environment, *etc.* In the embodiment shown in FIG. 17, the system 10 first obtains the employer's skill requirements, as shown in block 362. The system 10 next obtains a candidate's skill
10 information from the database 500, as shown in block 364. In block 365, the system 10 determines whether the candidate is seeking the identical position that the employer is seeking to fill. If the candidate is not seeking the identical position, the system moves to block 370. Otherwise, the system moves to block 366 where the system 10 computes the correspondence between the employer's skill requirements and the candidate's skills
15 information. In one embodiment, the system 10 determines the correspondence by computing the least squares value between the employer's skill requirements and the candidate's skills information. This curve fitting approach gives a good estimate of the correspondence between the employer's parameters and the candidate's parameters. Other known techniques for determining the correspondence between two parameters
20 may be used, as will be appreciated by those skilled in the art. In block 368, the system 10 calculates the points for the skills match. The system then moves to the next functional block 332 to calculate the challenges match. Where the candidate is not seeking the identical position that the employer is seeking to fill, the system 10 will determine whether the candidate's skills are in the same functional area as specified by
25 the employer, as shown in block 370. If they are not, the system moves to the challenges match, block 332. Otherwise, if the candidate's skills are in the same functional area as specified by the employer, the system sets default points corresponding to the functional area of the candidate's skills, as shown in block 371. Then, the system stores the applicable matching points corresponding to the skills match and/or the functional area
30 match, as shown in block 372. The system 10 then moves on to the next functional block 332 to calculate the challenges match.

FIG. 18 illustrates an embodiment of a challenges matching process of block 332 of FIG. 16 in more detail. In the embodiment shown in FIG. 18, the system 10 first obtains the employment challenges identified by the employer, as shown in block 374. The system 10 then obtains the candidate challenges identified by the candidate, as shown in block 376. These challenges may include working in a rapidly changing environment, working with major new systems initiatives, being number one or two in an industry, working at a fast growth company, with major new systems, focusing on market share increases, *etc.* The system 10 then matches the employment challenges with the challenges identified by each candidate in the database 500, as shown in block 378. Candidates with at least three matches are then identified, as shown in block 380. Candidates with at two matches are then identified, as shown in block 382. Next, the system 10 identifies candidates with one challenges match, as shown in block 384. The system 10 calculates the corresponding points for each candidate for the challenges match in block 386. The points are then stored to the database 500, as shown in block 388.

FIGs. 19a and 19b illustrate an embodiment of the industry matching process of block 334 of FIG. 16 in more detail. In the embodiment shown in FIG. 19a, the system 10 retrieves from the database 500 the employer's required industry classification, *i.e.*, the industry from which the candidate must be obtained (as specified by the employer), as shown in block 390. In one embodiment, the U.S. government's standard industry classification (SIC) is used to determine whether the employer's required industry experience matches the candidate's industry experience. SIC codes are classified such that each category has a two number code, and each subcategory thereunder has from a three to five digit code depending on the specificity of the subcategory. An example SIC code for engineering is as follows:

87	Engineering & Management Services
871	Engineering & Architectural Services
8711	Engineering services
8712	Architectural services
8713	Surveying Services
872	Accounting, Auditing & Bookkeeping.

The system 10 retrieves from the database 500 the SIC code for each candidate, as shown in block 392. Next, the system 10 matches the employer SIC code with each candidate's SIC code, as shown in block 394. If the SIC codes match, the system 10
5 calculates the points corresponding to the match, as shown in block 400. Otherwise, if the SIC codes do not match, the system 10 drops from the employer's required classification the last SIC digit and then compares the resulting SIC code with each candidate's SIC code to determine whether there is a match, as shown in block 396. Because of the SIC code classification scheme, dropping the last SIC digit from the
10 employer's required classification and then re-comparing the resulting SIC code with each candidate's SIC code determines whether there is a more general industry classification match. That is what is done in block 396. It will be appreciated, however, that other industry classification systems may be used instead, such as, for example, the North American Industry Classification System (NAICS) which is a six digit
15 classification code, as opposed to the five digit SIC code. Similar to the SIC code, the first two digits of the NAICS code designate major economic sectors.

In the described embodiment, if the SIC classifications match, the system 10 moves on to block 400. Otherwise, if the SIC classifications do not match, the system 10 then determines whether the employer SIC code resulting from block 396 is less than 2
20 digits, as shown in block 398. If it is not, blocks 396 and 398 are repeated. Otherwise, there is no classification match and the system 10 moves on to block 400. There, the system 10 calculates the points for the industry classification(s) match. Where only a partial industry match is found (e.g., a two digit SIC code match), less points are awarded. The total points awarded are then stored to the database 500, as shown in block
25 402.

In the embodiment shown in FIG. 19b, the system 10 retrieves from the database 500, in block 404, the employer's "desired" SIC industry classification, as opposed to the "required" SIC classification, as detailed above in connection with FIG. 19a. The system 10 then retrieves from the database 500 the SIC industry classification for each
30 candidate, as shown in block 406. Next, the system 10 matches the employer's desired SIC industry classification with each candidate's SIC code, as shown in block 408. If the

SIC codes match, the system 10 calculates the points corresponding to the match, as shown in block 416. Otherwise, if the SIC codes do not match, the system 10 drops from the employer's desired industry classification the last SIC digit and then compares the resulting SIC code with each candidate's SIC code to determine whether there is a match, as shown in block 410. If the SIC codes match, the system 10 moves on to block 416. Otherwise, if the SIC codes do not match, the system 10 then determines whether the employer SIC code resulting from block 410 is less than 2 digits, as shown in block 412. If it is not, blocks 410 and 412 are repeated. Otherwise, there is no industry classification match and the system 10 moves on to block 414. Block 414 checks whether the system 10 has reached the end of the candidate's SIC codes, *i.e.*, where the candidate has worked in more than one industry, the system 10 compares each of the candidate's classification codes for each industry. If the system has not reached the end of the candidate's SIC list, the candidate's next SIC code is retrieved (block 406) and the process is repeated. Otherwise, the system 10 moves on to block 416. There, the system 10 calculates the points for the industry classification(s) match. The points are then stored to the database 500, as shown in block 418.

FIG. 20 illustrates an embodiment of a company matching process of block 336 of FIG. 16 in more detail. In the embodiment shown in FIG. 20, the system 10 first retrieves from the database 500, in block 420, the employer's company preference, *i.e.*, the company from which the employer desires to hire the candidate. The system 10 then retrieves from the database 500 the current or last company where each candidate works (or worked), as shown in block 422. In block 424, the system 10 then looks-up the company identification number for each candidate's current or last company in the database 500. The company identification numbers are obtained from lists such as Fortune 500, America's Most Admired Companies, The Global 500, *etc.* Next, the system 10 determines whether the employer's desired company matches each candidate's company, as shown in block 426. If the companies match, the system 10 calculates the points corresponding to the match, as shown in block 432. Otherwise, if the companies does not match, the system 10 determines whether the system 10 has reached the end of the list of companies where each candidate worked, as shown in block 428. If the system has not reached the end of the candidate's company list, the next listed company is

retrieved (block 422) and processing continues using the candidate's next prior employer. Otherwise, the system 10 moves on to block 430 where the system 10 determines whether it has reached the end of the employer's list of preferred companies. If the system 10 has not reached the end of the employer's list, the next listed preferred
5 company is retrieved at block 420 and processing continues using the employer's next preferred company. Otherwise, the system 10 moves on to block 432 where the system 10 calculates the points for the company(s) match. The points are then stored to the database 500, as shown in block 434.

FIG. 21 illustrates an embodiment of a company size matching process of block
10 338 of FIG. 16 in more detail. In the embodiment shown in FIG. 21, in block 600, the system 10 retrieves from the database 500 the company size desired by the employer. In other words, the size of the company from which the employer desires to hire the candidate. Next, the system retrieves the candidate's company size experience data, as shown in block 602. In one embodiment, the size of each prior company where the
15 candidate has worked is retrieved along with the candidate's position in each company (*e.g.*, if the candidate was an executive at a company warranting a size adjustment, then a multiplier is multiplied to the company size adjustment). The system 10 then computes each candidate's current company size as a percentage of the company size desired by the employer and applies a corresponding number of matching points, as shown in block
20 604. In block 606, the system determines whether the candidate has any additional experience. If he/she does not, the system moves to block 614. If the candidate does have additional experience, the system computes each candidate's next prior company size as a percentage of the company size desired by the employer and applies a corresponding number of matching points, as shown in block 608. In block 610, the
25 system again determines whether the candidate has any additional experience. If he/she does not, the system moves to block 614. If the candidate does have additional experience, the system computes each candidate's second prior company size as a percentage of the company size desired by the employer and applies a corresponding number of matching points, as shown in block 612. Then, in block 614, the system
30 awards each candidate with the points corresponding to the largest of each candidate's current, or prior, company. The points are then stored to the database 500, as shown in

block 616. Next, the system 10 moves on to the next functional block 340 to perform the company classification match.

FIG. 22 illustrates an embodiment of the company classification matching process of block 340 of FIG. 16 in more detail. In the embodiment shown in FIG. 22, the system 10 retrieves from the database 500, in block 436, the employer's preferred company classification, *i.e.*, the type of company from which the employer desires to hire the candidate. Examples of preferred company classification lists include: The Fortune 100, The Fortune 500, The Fortune 1,000, The Global 500, America's Fastest Growing Companies, America's Most Admired Companies, *etc.* The system 10 then retrieves from the database 500 the current or last company where each candidate works (or worked), as shown in block 438. In block 440, the system 10 then looks-up the company identification number for each candidate's company in the database 500. Next, the system 10 matches the employer's desired company classification with each candidate's company classification, as shown in block 442. If the company classifications match, the system 10 calculates the points corresponding to the match, as shown in block 448. Otherwise, if the company classifications do not match, the system 10 determines whether it has reached the end of the list of companies where the candidate has worked, as shown in block 444. If the system has not reached the end of the candidate's list, the next company on the list is retrieved (block 438) and the process is continued using the candidate's next prior employer. Otherwise, the system 10 moves on to block 446 where the system 10 determines whether it has reached the end of the employer's list of preferred company classifications. If the system 10 has not reached the end of the employer's list, the next preferred company classification on the list is retrieved (block 436) and processing continues using the employer's next preferred company classification. Otherwise, the system 10 moves on to block 448 where the system 10 calculates the points for the company classification(s) match. The points are then stored to the database 500, as shown in block 450.

FIG. 23 illustrates an embodiment of an experience matching process of blocks 342 and 343 of FIG. 16 in more detail. In the embodiment shown in FIG. 23, the system 10 retrieves from the database 500, in block 452, the employer's required experience. The system 10 then retrieves from the database 500 each candidate's number of years of

experience by position and by functional area, and each candidate's total number of years of experience, as shown in block 454. In block 456, the system 10 determines each candidate's experience as a percentage of the employer's required experience by position (e.g., CFO), as shown in block 456. For example, a candidate may have 60% of the
5 number of years of experience required by the employer for the employment position. The system 10 calculates, in block 458, the points corresponding to the degree of match found in block 456. The system 10 then determines each candidate's experience as a percentage of the employer's required experience by functional area (e.g., accounting), as shown in block 459. The system 10 then determines, in block 460, each candidate's
10 experience as a percentage of the employer's required total number of years of experience. Next, the system 10 calculates the combined points corresponding to the degree of match between each candidate's experience by functional area and each candidate's total years of experience, in block 461. Each candidate's points are then stored to the database 500, as shown in block 462. Next, the system 10 moves on to the
15 next functional block 344 to perform degree matching.

FIGs. 24a and 24b illustrate an embodiment of a degree matching process of block 344 of FIG. 16 in more detail. In the embodiment shown in FIG. 24a, the system 10 retrieves from the database 500, in block 463, the employer's required degree. The system 10 then retrieves from the database 500 each candidate's education data
20 (including degree(s)), as shown in block 464. In block 466, the system 10 determines whether the employer's required degree matches each candidate's degree. If the degrees match, the system 10 calculates the points corresponding to the match, as shown in block 472. Otherwise, if the degrees do not match, the system 10 determines whether it has reached the end of each candidate's list of degrees, as shown in block 468. If the system
25 has not reached the end of the candidate's list, the candidate's next degree is retrieved (block 464) and processing continues using that degree. Otherwise, the system 10 moves on to block 470 where the system 10 determines whether it has reached the end of the employer's list of required degrees. If the system 10 has not reached the end of the employer's list, the next required degree is retrieved (block 463) and processing
30 continues using the employer's next required degree. Otherwise, the system 10 moves

on to block 472 where the system 10 calculates the points for the degree(s) match. The points are then stored to the database 500, as shown in block 474.

In the embodiment shown in FIG. 24b, the system 10 retrieves from the database 500, in block 476, the employer's desired education data such as degree, degree type and/or major, as opposed to the required degree, as detailed above in connection with FIG. 24a. As used herein, the term "degree" refers to whether a degree is a bachelor of arts or science degree or an associate degree, the term "degree type" refers to whether a candidate's degree is an undergraduate and graduate degree, and the term "major" refers to a candidate's college major, such as, for example, accounting, finance, sales, marketing, engineering, *etc.* The system 10 retrieves from the database 500, in block 478, each candidate's education data (including degree(s), degree type(s) and/or major(s)).

In block 480, the system 10 determines whether the employer's desired degree matches each candidate's degree. If the degrees match, the system 10 moves on to block 486 where the system 10 determines whether it has reached the end of the candidate's education data. If the system 10 has not reached the end of the candidate's data, the candidate's next degree is retrieved (block 478) and processing continues using the candidate's next degree. Otherwise, if the degrees do not match, the system 10 determines whether the desired degree type (*e.g.*, a masters degree) matches the candidate's degree type, as shown in block 482. If there is a degree type match, the system 10 moves on to block 486 where the system 10 determines whether it has reached the end of the candidate's education data. If the system 10 has not reached the end of the candidate's data, the candidate's next degree and/or degree type is retrieved (block 478) and processing continues using the candidate's next degree and/or degree type. Otherwise, the system 10 determines whether the employer's desired major matches the candidate's major, as shown in block 484.

Whether or not the majors match, the system 10 moves on to block 486 where the system 10 determines whether it has reached the end of the candidate's education data. If the system 10 has not reached the end of the candidate's data, the candidate's next degree, degree type and/or major is retrieved (block 478) and processing continues using the candidate's next degree, degree type and/or major. Otherwise, the system 10 moves

on to block 488 where the system 10 determines whether it has reached the end of the employer's list of desired education data. If the system 10 has not reached the end of the employer's list, the next desired degree, degree type and/or major is retrieved (block 476) and the process is continued using the employer's next desired degree, degree type and/or major. Otherwise, the system 10 moves on to block 490 where the system 10 calculates the points corresponding to the education data match. The points are then stored to the database 500, as shown in block 492.

FIG. 25 illustrates an embodiment of a certification matching process of block 346 of FIG. 16 in more detail. In the embodiment shown in FIG. 25, the system 10 retrieves from the database 500, in block 620, the professional certifications required or desired by the employer. The system then retrieves a candidate's experience data including professional certifications, if any, in block 622. Next, the system determines, in block 624, whether the candidate has the employer's desired certification. If there is no match, the system moves to block 628. Otherwise, if there is a desired certification match, the system moves to block 626 where the system awards the total points available for a match. In block 628, the system determines whether the candidate has any other certifications. If the system has not reached the end of the candidate's certifications, the candidate's next certification is retrieved (block 622) and processing continues using the candidate's next certification. Blocks 622, 624, 626, and 628 are repeated until all of the candidate's certifications are evaluated. Next, the points are stored to the database 500, as shown in block 630. The system 10 then moves on to the next functional block 348 to perform assessment matching.

FIG. 26 illustrates an embodiment of a qualitative matching process of block 348 of FIG. 16 in more detail. In the embodiment shown in FIG. 26, the system 10 retrieves from the database 500, in block 632, the qualitative assessment results for the employer. The system 10 then retrieves the qualitative assessment results for a candidate, in block 634. Next, the system determines, in block 636, the degree of correspondence between the employer and candidate qualitative assessment results. In one embodiment, the system 10 determines the correspondence by computing the least squares value between the employer's and the candidate's results. This is one of a number of known curve fitting techniques that can be used. In another embodiment, a matching program

developed by Decision Dynamics Group of Thousand Oaks, California is used. This embodiment is explained in more detail below in relation to FIGs. 28a-28b. The system 10 then stores the average degree of match percentage to the database 500, as shown in block 644. The system 10 then moves on to the next functional block 350, the scoring table.

In the matching program developed by Decision Dynamics Group, the system 10 retrieves, in block 650, the responses from the candidate questionnaires (representative candidate questions are shown in FIGs. 10c-x). The candidate responds to each question by selecting a qualitative parameter value, *e.g.*, between one to seven. The system 10 then retrieves, in block 652, the responses from the employer questionnaires (representative employer questions are shown in FIGs. 6c-p). The employer responds to each question by selecting a qualitative parameter value, *e.g.*, between one to seven. Next, the system matches the candidate and employer responses, as shown in block 658. The matching block 658 is shown in more detail in FIG. 28b. There, each qualitative candidate parameter is matched with each corresponding qualitative employer parameter and the degree of correspondence between them is calculated as a percentage (block 660). For example, if the candidate assigned the first parameter a value of six and the employer assigned the first parameter a value of six, there would be a 100% match. The percentage match for each group of parameters is then determined (block 662). For example, if the qualitative parameters are grouped into three groups, the average degree of match for each group is determined (see *e.g.*, FIG. 12a for an example employer screen showing the percentage match for three groups of qualitative parameters, "overall style fit", "role style fit", and "operating style fit"). If there are, *e.g.*, three parameters per group, and the correspondence between the employer and candidate parameters is 100%, 80% and 60%, respectively, then the average degree of match for that group is 80%. Next, the percentage match for all the qualitative parameters is totaled and averaged (block 664). The average degree of match between all the qualitative parameters is determined by totaling the percentage match between each employer and candidate parameter and dividing by the total number of parameters.

FIGs. 27a-c illustrate a table showing an embodiment of the scoring process of block 350 of FIG. 16 in more detail. In one embodiment, the system 10 first applies the

parameter weights assigned by the employer and then computes the total degree of correspondence score for each candidate. Referring to the scoring table of FIG. 27a, the responsibilities match of block 330 is determined, in one embodiment, by computing the least squares value between the employer's responsibilities requirements and the candidate's responsibilities information. Initially, the employer distributes 100 points between 10 required responsibilities (see *e.g.*, FIG. 6b). Likewise, the candidate distributes 100 points between 10 responsibilities in which the candidate has experience (see *e.g.*, FIG. 10a). The calculations proceed by subtracting the points assigned by the employer from the points assigned by the candidate and squaring that difference for each responsibility. Then, the sum of the squares is added to yield a gross value. Depending on where the gross value falls on the match Criteria Scale, the system 10 awards the appropriate points. For example, if the gross value is 350, then the candidate has responsibilities that are Related to the employer's requirements. Accordingly, the system awards 70 points for the Related match.

The challenges match of block 332 is determined, in one embodiment, by determining whether the candidate identified any of the challenges listed by the employer as being important. In one embodiment, the employer selects three challenges out of a list of, for example, 15 challenges as being important to the employment position (see *e.g.*, FIG. 6a). Then, if the candidate selects the same three challenges (see *e.g.*, FIG. 10b), the system awards 100 points. Similarly, if the candidate selects two of the same challenges, the system awards 80 points, and if the candidate selects one of the same challenges, the system awards 60 points.

The required industry match of block 334 is determined, in one embodiment, by comparing the industry classification identified by the candidate with the required industry identified by the employer. For example, the system will provide a list of industries from which the candidate can choose (see *e.g.*, FIG. 9b). Each industry has a corresponding 2-5 digit SIC code. Thus, the SIC code corresponding to the industry identified by the candidate is compared with the SIC code of the required industry identified by the employer (see *e.g.*, FIG. 5b). If there is a five-digit match, 100 points are awarded. Likewise, if there is a four-digit match, 80 points are awarded, if there is a

three-digit match, 60 points are awarded, and if there is a two-digit match, 40 points are awarded. Otherwise, no points are awarded.

The desired industry match of block 334 is determined in a similar manner; however, a maximum of 80 points are awarded to differentiate a desired industry match from a required industry match. Thus, if there is a five-digit match, 80 points are
5 awarded, if there is a four-digit match, 60 points are awarded, if there is a three-digit match, 40 points are awarded, and if there is a two-digit match, 20 points are awarded. Otherwise, no points are awarded. If the candidate has both the required and the desired industry experience sought by the employer, the higher of the two scores is awarded to
10 the candidate.

The determination of whether a candidate works at a desired company, as specified by the employer, (block 336) either produces a match or it does not produce a match; the candidate either works for the desired company or he/she does not. Thus, the system awards 100 points for a match, and no points otherwise.

15 Likewise, the determination of whether a candidate works for a company in a desired classification, as specified by the employer, (block 340) either produces a match or it does not produce a match; the candidate either works for a company in the desired classification or he/she does not. Thus, the system awards 100 points for a match, and no points otherwise.

20 Referring to FIG. 27b, the company size match of block 338 is determined, in one embodiment, by comparing the annual sales of the candidate's current employer with the annual sales range identified by the employer as desirable. For example, if an employer desires a candidate from a company having annual sales between \$101-\$300 million, and a candidate works at, for example, a manufacturing company with annual sales of \$150
25 million, the system will award 100 points. However, if the candidate works at, for example, a manufacturing company with annual sales of \$25 million, the system will award 60 points. In another embodiment, the number of staff at the candidate's company (for example a law firm or accounting firm) is compared with the number of staff range identified by the employer as desirable. For example, if an employer desires a candidate
30 from a law firm having between 75-99 attorneys, and a candidate works at a law firm with 80 staff attorneys, the system will award 100 points. However, if the candidate

works at a law firm with 10 staff attorneys, the system will award 40 points. In still another embodiment, the total assets of the candidate's company (for example a bank or brokerage firm) are compared with the assets range identified by the employer as desirable. For example, if an employer desires a candidate from a brokerage firm having
5 between \$251-\$500 billion in assets, and a candidate works at a brokerage firm with \$270 billion in assets, the system will award 100 points. However, if the candidate works at a brokerage firm with \$15 billion in assets, the system will award 60 points.

The experience match of block 342 is determined, in one embodiment, by comparing the candidate's number of years of experience (measured in months) with the
10 years of experience required by the employer. If the candidate has less than 50% of the required experience, no points are awarded. However, if the candidate has at least 50% of the required experience, the system will award between 50 and 100 points. This is a linear function. Thus, if the candidate has 52% of the required experience then, 4 points are awarded. Likewise, if the candidate has 99% of the required experience, then 98
15 points are awarded.

The candidate's experience by function (block 342) is computed by comparing the candidate's number of years of experience (measured in months) at that function (e.g., accounting) with the years of experience by function required by the employer. This is computed as a linear function. Thus, if the candidate has 52% of the required
20 experience by function, then 52 points are awarded. Likewise, if the candidate has 99% of the required experience by function, then 99 points are awarded.

The total points awarded for the candidate's years of experience and years of experience by function are then averaged. Thus, in the above example, if the candidate was awarded 4 points and 52 points for the candidate's years of experience and years of
25 experience by function, respectively, then the system would award a total of 28 points for the candidate's experience.

The candidate's experience by position (block 343) is computed by comparing the candidate's number of years of experience (measured in months) at that position (e.g., CFO) with the years of experience by position required by the employer. This is
30 computed as a linear function. The candidate's current and last three jobs are evaluated, with each prior job point total being discounted by an appropriate multiplier. Thus, if the

candidate's current job provides 52% of the required experience by position, then 52 points are awarded. Likewise, if the candidate's first prior job provides 40% of the required experience by position, then 40 points times 80% or 32 points are awarded. If the candidate's second prior job provides 75% of the required experience by position, then 75 points times 60% or 45 points are awarded. And if the candidate's third prior job provides 30% of the required experience by position, then 30 points times 40% or 12 points are awarded. The total of all the points awarded for the candidate's current and last three jobs are totaled, with a maximum of 100 points awarded.

Referring to FIG. 27c, the degree match of block 344 is determined, in one embodiment, by comparing the candidate's degree with the employer's required degree. Here, either the degrees match or they do not match; thus, the system awards 100 points for a match, and no points otherwise.

The desired degree match of block 344 is computed by comparing the candidate's degree with the employer's desired degree. If, for example, the desired degree is a Ph.D. in finance, and the candidate has a Ph.D. in finance, 80 points are awarded (not 100 so that the required and desired degree scores can be differentiated). If the candidate has a Ph.D. in accounting, 60 points are awarded for this equivalent degree (*i.e.*, a doctorate degree). If the candidate has an MBA in management, 40 points are awarded for this lower level degree (*i.e.*, a masters degree). If the candidate has a BS in finance, 0 points are awarded.

The certification match of block 346 is determined, in one embodiment, by comparing the candidate's certification with the employer's required certification. Here, either the certifications (*e.g.*, CPA) match or they do not match; thus, the system awards 100 points for a match, and no points otherwise.

Likewise, the employer's desired certification (block 346) either matches or it does not match the candidate's certification; thus, the system awards 100 points for a match, and no points otherwise.

The quantitative parameter weights are then applied to the ten point totals from blocks 330, 332, 334, 336, 338, 340, 342, 343, 344 and 346 found in FIGs. 27a-c such that each candidate has between 0 and 100 points. For example, if the employer weighed all the first ten parameters equally (*i.e.*, 10 points each) when entering the information on

FIG. 5g, a candidate with 80 points for the challenges match would have 8 points. All the adjusted point totals for the ten parameters would be summed, yielding (y).

However, if the employer weighed four of the parameters equally (*i.e.*, 25 points each for four of the ten parameters), a candidate with 80 points for the challenges match would
5 have 20 points. The adjusted point total for the four weighted parameters would be summed, yielding (y). The candidate's quantitative parameter subtotal is determined by totaling the score for each quantitative parameter (x) and dividing by the total of the adjusted points (y), yielding (z).

The qualitative assessment match of block 348 is determined by comparing the
10 candidate and employer responses for each group of parameters. In the illustrated embodiment, there are three groups of qualitative parameters, (a), (b), and (c). The percentage match for each group is then totaled and averaged, yielding (d).

The candidate's final score is determined by taking the qualitative match percentage (d) (multiplying by 100) and adding that result to the quantitative parameter
15 subtotal (z) and dividing by two (the candidate's final score will be a number between one and 100).

In one embodiment, the qualitative assessment result (d) is 70% of the candidate's score and the ten quantitative parameter subtotal (z) is 30% of the candidate's score. However, the search consultant can adjust these default settings to
20 vary the weight given the qualitative assessment result, or any of the quantitative parameters, to prioritize the candidates found by the system.

In an alternative embodiment, candidates for a unique employment position are recruited by advertising in a publication, such as the Wall Street Journal. In this embodiment of the system 10, an advertisement is placed in a publication advertising an
25 employer's position and targeting specific candidates. The ad directs candidates to the recruiting website and includes a code that can be entered at the site allowing such candidates to access modified registration screens specifically targeted to obtaining information relevant to filling the advertised employment position. The employment parameters are matched with the candidate parameters, as detailed above in relation to
30 FIGs. 16-28b. The candidates are provided feedback, as detailed above in relation to FIG. 8.

While the present invention has been described with reference to one or more embodiments, those skilled in the art will recognize that many changes may be made thereto without departing from the spirit and scope of the present invention which is set forth in the following claims.

THE EMBODIMENTS OF THE INVENTION IN WHICH AN EXCLUSIVE
PROPERTY OR PRIVILEGE IS CLAIMED ARE DEFINED AS FOLLOWS:

1. A computer system for matching one or more candidates with an employment position of an employer, the computer system comprising:
 - 5 a processor; and
 - a database accessible to the processor;
 - the processor being programmed to:
 - retrieve employment parameters from the database;
 - retrieve candidate parameters from the database;
 - 10 compare the candidate parameters with the employment parameters; and
 - compute the degree of correspondence between the candidate parameters and the employment parameters.
2. The computer system of claim 1, wherein the computer system is further programmed to assign points based on the degree of correspondence.
- 15 3. The computer system of claim 2, wherein the computer system is further programmed to accumulate for the candidate a point total corresponding to the degree of correspondence.
4. The computer system of claim 1, wherein the database has stored therein employment parameters associated with an employment position record and a plurality of
20 candidate records, each candidate record having candidate parameters corresponding to the employment parameters;
 - wherein the candidate parameters are compared with the employment parameters by:
 - comparing individual ones of the employment parameters associated with
25 the employment record with corresponding individual ones of the candidate parameters associated with each of the candidate records; and
 - wherein the degree of correspondence is computed by:
 - calculating, for each comparison, a parameter comparison value; and
 - calculating, for each candidate record, a candidate matching value based
30 on the parameter comparison values.
5. The computer system of claim 1, wherein the computer system is further programmed to:

provide a candidate questionnaire to the candidate, the candidate questionnaire including candidate questions and qualitative assessment questions;

receive responses to the candidate questionnaire;

determine from the responses to the candidate questionnaire candidate

5 parameters; and

store the candidate parameters to the database.

6. The computer system of claim 1, wherein the computer system is further programmed to:

provide an employment questionnaire to an employer, the employment

10 questionnaire including employment position questions and qualitative assessment questions;

receive responses to the employment questionnaire;

determine from the responses to the employment questionnaire employment

parameters; and

15 store the employment parameters to the database.

7. The computer system of claim 1, wherein the employment parameters include the education, experience, position opening, compensation, employer location, and employer qualitative assessment parameters.

8. The computer system of claim 7, wherein the candidate parameters include

20 present employer, education, employment history, desired position, desired compensation, location preference, and candidate qualitative assessment parameters.

9. The computer system of claim 8, wherein the computer system is further programmed to provide the candidate qualitative assessment parameters to the candidate.

10. The computer system of claim 8, wherein the computer system is further
25 programmed to compare the set of candidate parameters with the set of employment parameters by:

comparing each candidate's education with the position's education parameters;

comparing each candidate's employment history with the position experience
parameters;

30 comparing each candidate's desired position with the position opening parameters;

comparing each candidate's desired compensation with the position compensation parameters;

comparing each candidate's location preference with the position location parameters; and

5 comparing each candidate's qualitative assessment with the employer qualitative assessment parameters.

11. The computer system of claim 10, wherein the candidate parameters include the candidate's education information, current position information, location preference, and current salary.

10 12. A computer system for matching one or more candidates with an employment position of an employer, the computer system comprising:

a processor; and

a database accessible to the processor;

the processor being programmed to:

15 retrieve employment parameters from the database;

retrieve responses to a candidate questionnaire, the candidate questionnaire including candidate questions and qualitative assessment questions; and

determine from the responses to the candidate questionnaire candidate parameters.

20 13. The computer system of claim 12, wherein the computer system is further programmed to:

provide an employment questionnaire to an employer, the employment questionnaire including employment position questions and qualitative assessment questions;

25 receive responses to the employment questionnaire; and

store the employment parameters to the database.

14. The computer system of claim 13, wherein the computer system is further programmed to determine from the responses to the employment questionnaire employment parameters.

30 15. The computer system of claim 14, wherein the computer system is further programmed to compare the candidate parameters with the employment parameters.

16. The computer system of claim 12, wherein the candidate parameters include present employer, education, employment history, desired position, desired compensation, location preference, and candidate qualitative assessment parameters.

17. The computer system of claim 16, wherein the computer system is further
5 programmed to provide the candidate qualitative assessment parameters to the candidate.

18. A method for matching one or more candidates with an employment position of an employer by processing electronically captured information, the method comprising:

providing a candidate questionnaire to a candidate, the candidate questionnaire including candidate questions and qualitative assessment questions;

10 electronically capturing responses to the candidate questionnaire;

determining from the responses to the candidate questionnaire candidate parameters;

storing the candidate parameters to a database;

providing an employment questionnaire to an employer, the employment
15 questionnaire including employment position questions and qualitative assessment questions;

electronically capturing responses to the employment questionnaire;

determining from the responses to the employment questionnaire employment parameters;

20 storing the employment parameters to the database;

retrieving the candidate parameters and the employment parameters from the database;

comparing the candidate parameters with the employment parameters; and

25 computing the degree of correspondence between the candidate parameters and the employment parameters.

19. The method of claim 18, further including assigning points based on the degree of correspondence.

20. The method of claim 19, further including accumulating a point total for the candidate corresponding to the degree of correspondence.

30 21. The method of claim 20, further including selecting the candidate based at least partially on the point total.

22. The method of claim 18, wherein the candidate parameters include present employer, education, employment history, desired position, desired compensation, location preference, and candidate qualitative assessment parameters.

23. The method of claim 18, wherein the employment parameters include education,
5 experience, position opening, compensation, employer location, and employer qualitative assessment parameters.

24. The method of claim 23, wherein comparing the candidate parameters further includes:

comparing each candidate's education with the position's education parameters;

10 comparing each candidate's employment history with the position experience parameters;

comparing each candidate's desired position with the position opening parameters;

15 comparing each candidate's desired compensation with the position compensation parameters;

comparing each candidate's location preference with the position location parameters; and

comparing each candidate's qualitative assessment with the employer qualitative assessment parameters.

20 25. A method of matching one or more candidates with an employment position of an employer using a computer server to process data from an Internet web site, the computer server including a database, the method comprising:

receiving employment parameters;

storing the employment parameters to the database;

25 receiving candidate parameters from a plurality of candidates;

storing the candidate parameters to the database;

retrieving the candidate parameters for each candidate and the employment parameters;

30 comparing the candidate parameters for each candidate with the employment parameters; and

computing the degree of correspondence between the candidate parameters for each candidate and the employment parameters.

26. The method of claim 25, further including assigning points based on the degree of correspondence for each candidate.

5 27. The method of claim 26, further including accumulating for each candidate a point total corresponding to the degree of correspondence for each candidate.

28. The method of claim 27, further including selecting one or more candidates based at least partially on the point total for each candidate.

29. The method of claim 25, further including:

10 providing an employment questionnaire to an employer, the employment questionnaire including employment position questions and qualitative assessment questions;

receiving responses to the employment questionnaire; and

15 determining from the responses to the employment questionnaire the employment parameters.

30. The method of claim 25, further including:

providing a candidate questionnaire to each candidate, the candidate questionnaire including candidate questions and qualitative assessment questions;

receiving responses to the candidate questionnaire from each candidate; and

20 determining from the responses from each candidate to the candidate questionnaire the candidate parameters for each candidate.

31. The method of claim 25, wherein the candidate parameters include present employer, education, employment history, desired position, desired compensation, location preference, and candidate qualitative assessment parameters.

25 32. The method of claim 31, wherein the employment parameters include education, experience, position opening, compensation, employer location, and employer qualitative assessment parameters.

33. The method of claim 32, wherein comparing the candidate parameters further includes:

30 comparing each candidate's education with the position's education parameters;

comparing each candidate's employment history with the position experience parameters;

comparing each candidate's desired position with the position opening parameters;

5 comparing each candidate's desired compensation with the position compensation parameters;

comparing each candidate's location preference with the position location parameters; and

comparing each candidate's qualitative assessment with the employer qualitative
10 assessment parameters.

34. A computer server for matching one or more candidates with an employment position of an employer by processing data from an Internet web site, the server comprising:

a processor; and

15 a database accessible to the processor;

the processor being programmed to:

provide a candidate questionnaire to a candidate, the candidate questionnaire including candidate questions and qualitative assessment questions;

receive responses to the candidate questionnaire;

20 determine from the responses to the candidate questionnaire candidate parameters;

store the candidate parameters to the database;

provide an employment questionnaire to an employer, the employment questionnaire including employment position questions and qualitative assessment
25 questions;

receive responses to the employment questionnaire;

determine from the responses to the employment questionnaire employment parameters;

store the employment parameters to the database;

30 retrieve the candidate parameters and the employment parameters from the database;

compare the candidate parameters with the employment parameters; and
compute the degree of correspondence between the candidate parameters
and the employment parameters.

35. The computer server of claim 34, wherein the server is further programmed to
5 assign points based on the degree of correspondence.

36. The computer server of claim 35, wherein the server is further programmed to
accumulate for the candidate a point total corresponding to the degree of correspondence.

37. The computer server of claim 34, wherein the candidate parameters include
present employer, education, employment history, desired position, desired
10 compensation, location preference, and candidate qualitative assessment parameters.

38. The computer server of claim 37, wherein the employment parameters include
education, experience, position opening, compensation, employer location, and employer
qualitative assessment parameters.

39. The computer server of claim 38, wherein the server is further programmed to
15 compare the candidate parameters with the employment parameters by:

comparing the candidate's education with the position's education parameters;

comparing the candidate's employment history with the position experience
parameters;

comparing the candidate's desired position with the position opening parameters;

20 comparing the candidate's desired compensation with the position compensation
parameters;

comparing the candidate's location preference with the position location
parameters; and

comparing the candidate's qualitative assessment with the employer qualitative
25 assessment parameters.

40. A method of receiving employer information from an employer, the method
comprising:

providing an employment questionnaire to an employer, the employment
questionnaire including employment position questions and qualitative assessment
30 questions;

receiving responses to the employment questionnaire;

46

determining from the responses to the employment questionnaire employment parameters; and

storing the employment parameters to a database.

41. The method of claim 40, wherein the employment questionnaire seeks
5 information relating to the qualities the employer desires in a candidate such as the candidate's work experience, company size, company position, education, certifications, and compensation.

42. A computer system for matching one or more candidates with an employment position of an employer, the computer system comprising:

10 a processor; and

a database accessible to the processor;

the processor being programmed to:

provide an employment questionnaire to an employer, the employment
questionnaire including employment position questions and qualitative assessment
15 questions;

receive responses to the employment questionnaire;

determine from the responses to the employment questionnaire
employment parameters, the employment parameters including education, experience,
position opening, compensation, employer location, and employer qualitative assessment
20 parameters;

store the employment parameters to the database;

provide a candidate questionnaire to a candidate, the candidate
questionnaire including candidate questions and qualitative assessment questions;

receive responses to the candidate questionnaire;

25 determine from the responses to the candidate questionnaire candidate parameters, the candidate parameters including present employer, education, employment history, desired position, desired compensation, location preference, candidate qualitative assessment parameters;

store the candidate parameters to the database;

30 provide the candidate qualitative assessment parameters to the candidate;

compare the candidate parameters with the employment parameters,

including:

comparing the candidate's education with the position's education

parameters;

comparing the candidate's employment history with the position

experience parameters;

comparing the candidate's desired position with the position

opening parameters;

comparing the candidate's desired compensation with the position

compensation parameters;

comparing the candidate's location preference with the position

location parameters; and

comparing the candidate's qualitative assessment with the

employer qualitative assessment parameters;

compute the degree of correspondence between the candidate parameters

and the employment parameters;

assign points based on the degree of correspondence; and

accumulate a point total for the candidate corresponding to the degree of
correspondence.

43. A computer system for matching one or more candidates with an employment
position of an employer, the computer system comprising:

a processor; and

a database accessible to the processor;

the processor being programmed to:

provide an employment questionnaire to an employer, the employment
questionnaire including employment position questions and qualitative assessment
questions;

receive responses to the employment questionnaire;

determine from the responses to the employment questionnaire

employment parameters, the employment parameters including education, experience,

position opening, compensation, employer location, and employer qualitative assessment parameters;

store the employment parameters to the database;

provide a candidate questionnaire to a plurality of candidates, the candidate questionnaire

5 including candidate questions and qualitative assessment questions;

receive responses to the candidate questionnaire from each candidate;

determine from the responses from each candidate to the candidate

questionnaire candidate parameters for each candidate, the candidate parameters

including present employer, education, employment history, desired position, desired

10 compensation, location preference, and candidate qualitative assessment parameters;

store the candidate parameters for each candidate to the database;

provide the candidate qualitative assessment parameters for each

candidate to each candidate;

compare the candidate parameters for each candidate with the

15 employment parameters, including:

comparing each candidate's education with the position's

education parameters;

comparing each candidate's employment history with the position

experience parameters;

20 comparing each candidate's desired position with the position

opening parameters;

comparing each candidate's desired compensation with the

position compensation parameters;

comparing each candidate's location preference with the position

25 location parameters; and

comparing each candidate's qualitative assessment with the

employer qualitative assessment parameters;

compute the degree of correspondence between the candidate parameters

for each candidate and the employment parameters;

30 assign points based on the degree of correspondence for each candidate;

and

accumulate a point total for each candidate corresponding to the degree of correspondence for each candidate.

44. A computer system for matching one or more candidates with a specific employment position of an employer by advertising in a publication, the computer system comprising:

a processor; and

a database accessible to the processor;

the processor being programmed to:

receive a code from the advertisement;

10 receive responses to a candidate questionnaire, the candidate questionnaire including candidate questions and qualitative assessment questions relating to the advertised employment position;

determine from the responses from each candidate to the candidate questionnaire candidate parameters for each candidate;

15 compare the candidate parameters with the employment parameters, and compute the degree of correspondence between the candidate parameters and the employment parameters.

45. A computer implemented method for matching one or more candidates with an employment position of an employer, comprising:

20 retrieving employment parameters from a database;

retrieving candidate parameters from the database;

comparing the candidate parameters with the employment parameters; and

computing the degree of correspondence between the candidate parameters and the employment parameters.

25 46. The method of claim 45, wherein the database has stored therein employment parameters associated with an employment position record and a plurality of candidate records, each candidate record having candidate parameters corresponding to the employment parameters;

wherein comparing the candidate parameters with the employment parameters
30 comprises comparing individual ones of the employment parameters associated with the

employment record with corresponding individual ones of the candidate parameters associated with each of the candidate records; and

wherein computing the degree of correspondence comprises:

calculating, for each comparison, a parameter comparison value; and

5 calculating, for each candidate record, a candidate matching value based on the parameter comparison values.

47. An Internet based method of receiving information, the method comprising:

providing a website having a user interface including one or more user windows, the one or more windows providing an employment questionnaire to an employer, the
10 employment questionnaire including employment position questions and qualitative assessment questions;

receiving at the website responses to the employment questionnaire;

determining from the responses to the employment questionnaire employment parameters; and

15 storing the employment parameters to a database.

48. The method of claim 47, further comprising:

providing a website having a user interface including one or more user windows, the one or more windows providing a candidate questionnaire to a candidate, the candidate questionnaire including candidate quantitative questions and qualitative
20 assessment questions;

receiving at the website responses to the candidate questionnaire;

determining from the responses to the candidate questionnaire candidate parameters; and

storing the candidate parameters to the database.

25 49. A computer-readable storage medium containing computer executable code for instructing a computer to operate as follows:

provide an employment questionnaire to an employer, the employment questionnaire including employment position questions and qualitative assessment questions;

30 receive responses to the employment questionnaire;

determine from the responses to the employment questionnaire employment parameters; and

store the employment parameters to a database.

50. A method for matching one or more candidates with an employment position of
5 an employer by executing computer code contained on a computer-readable storage medium, the method comprising:

providing an employment questionnaire to an employer, the employment questionnaire including employment position questions and qualitative assessment questions;

10 receiving responses to the employment questionnaire;

determining from the responses to the employment questionnaire employment parameters; and

storing the employment parameters to a database.

51. The method of claim 50, further comprising:

15 providing a candidate questionnaire to a candidate, the candidate questionnaire including candidate quantitative questions and qualitative assessment questions;

receiving responses to the candidate questionnaire;

determining from the responses to the candidate questionnaire candidate parameters; and

20 storing the candidate parameters to a database.

52. The method of claim 51, wherein the candidate questionnaire includes qualitative assessment questions related to the candidate's job challenges, operating styles, role styles, leadership styles, motivations, and business environment experience.

53. The method of claim 52, wherein the qualitative assessment questions include
25 conjoint analysis questions.

54. The method of claim 52, wherein the qualitative assessment questions include organizational cultural assessment, job profile assessment, and conjoint analysis questions.

55. The method of claim 52, wherein the qualitative assessment questions include
30 organizational cultural assessment questions.

52

56. The method of claim 52, wherein the qualitative assessment questions include job profile assessment questions.

57. The method of claim 50, wherein the employment questionnaire includes questions related to the employer's organization, operating style, company challenges, position challenges, leadership style, and company motivations.

58. A method of receiving quantitative candidate information from a candidate, the method comprising:

providing a candidate questionnaire to the candidate, the candidate questionnaire including quantitative candidate questions;

electronically capturing responses to the candidate questionnaire;

determining from the responses to the candidate questionnaire candidate parameters;

storing the candidate parameters to a database;

retrieving employment parameters from the database;

comparing the candidate parameters with the employment parameters; and

computing the degree of correspondence between the candidate parameters and the employment parameters.

59. The method of claim 58, wherein the candidate parameters include present employer, education, employment history, desired position, desired compensation, and location preference parameters.

60. The method of claim 59, further including verifying the candidate's education.

61. The method of claim 58, further including determining a skills rating for the candidate based on the candidate parameters.

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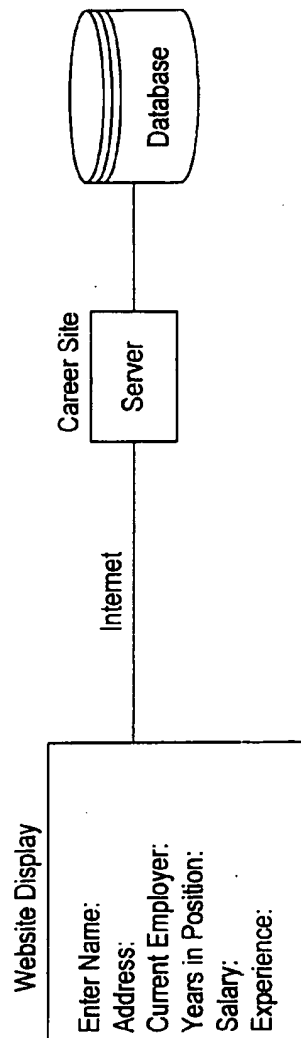
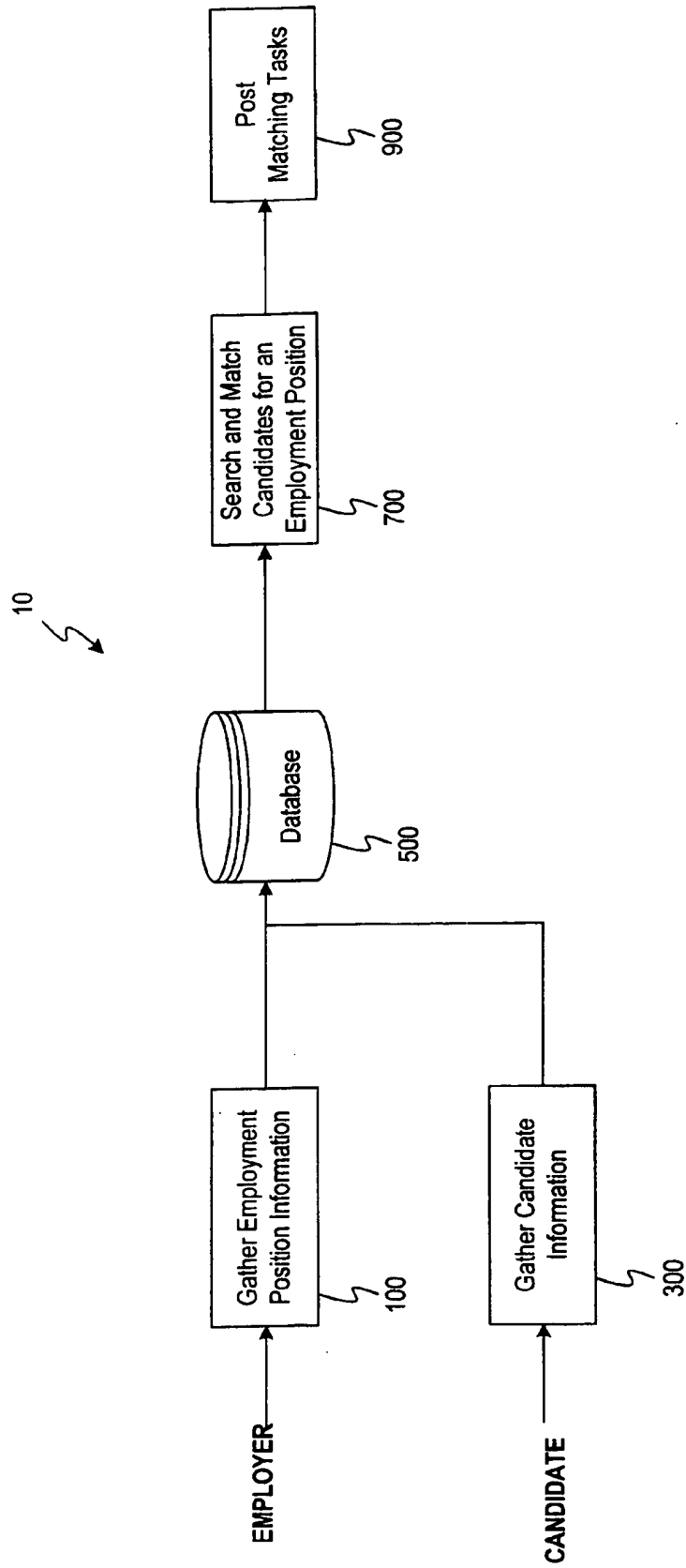


FIG. 1
(Prior Art)

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FIG. 2*Photo on Disk*

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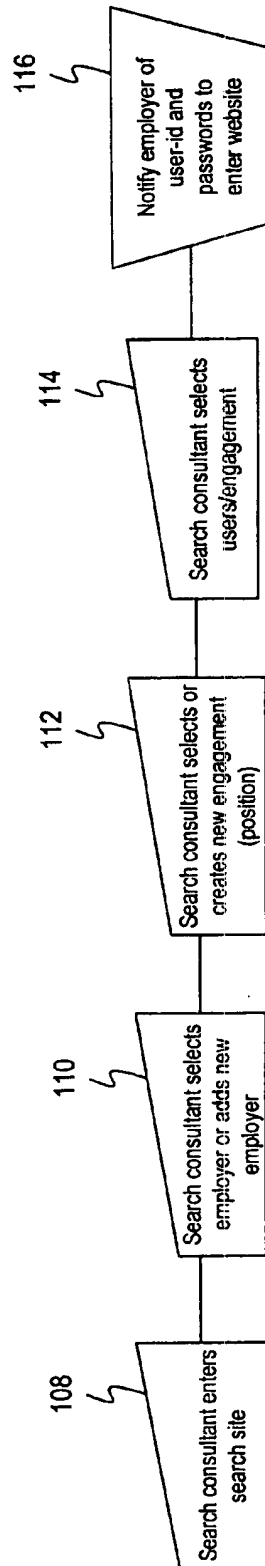


FIG. 3

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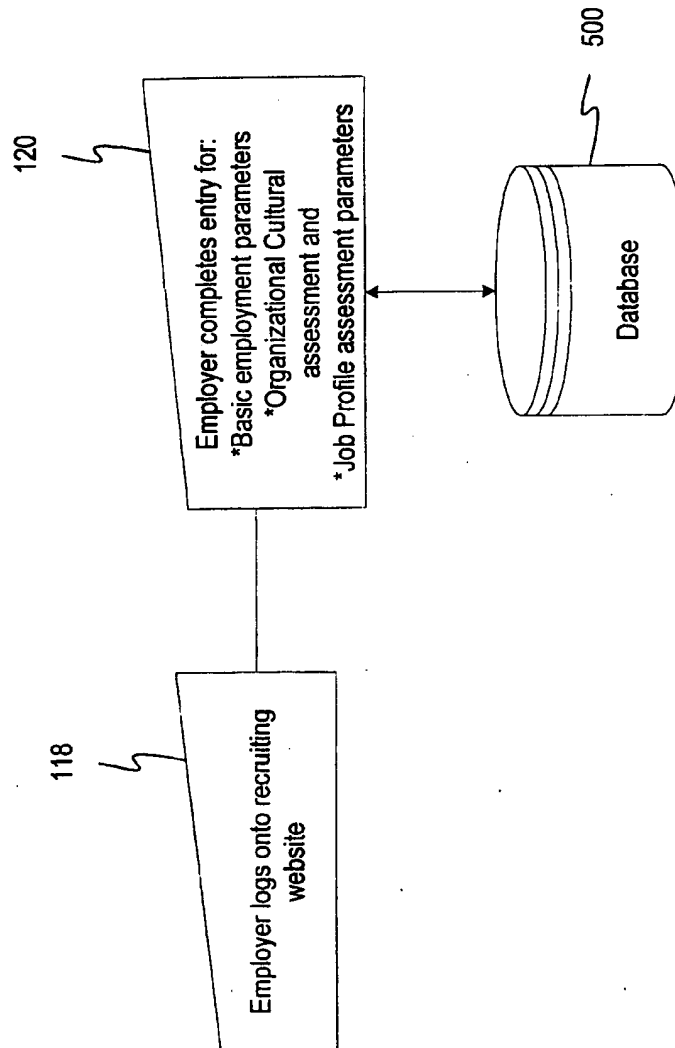


FIG. 4

Handwritten signature

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**Company
& Position
Description****Company Description (Division, if applicable)**

Outline briefly, the products or services provided by your company or division:

--	--

Revenue/Assets

Total number of employees

Name of parent company (if applicable)

Position Description

Position Title:

Position reports to:

Primary title:

Location:

Additional title:

Location:

Number of direct reports:

Number of total staff
reporting to position:

Departmental budget:\$

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FIG. 5a

David A. Clark

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**Industry
Experience
Required**

Lodging and Foodservice	Select From List
Admin Svcs (incl Waste Mgmt)	Select From List
Ag/Forestry/Fishing/Hunting	Select From List
Arts, Entertainment & Rec	Select From List
Banking and Finance	Select From List
Chemicals/Plastics/Pharma Mfg	Select From List
Construction	Select From List
Educational Services	Select From List
Non-durable Mfg incl Food	Select From List
Health Care & Social Assist	Select From List
High-Tech Industries	Select From List
Information & Media	Select From List
Insurance & Investment Funds	Select From List
Machinery & Elec Eqpt Mfg	Select From List
Holding Company Mgmt Svcs	Select From List
Material/Metal Mfg & Products	Select From List
Mining (including Oil & Gas)	Select From List
Non-profit Organizations	Select From List
Professional/Sci-Tech Svcs	Select From List
Public Administration	Select From List
Real Estate & Rental/Lessing	Select From List
Retail Trade	Select From List
Transportation Services	Select From List
Transport/Aerospace Eqpt Mfg	Select From List
Unclassified Establishments	Select From List
Utilities	Select From List
Wholesale Trade	Select From List

FIG. 5b
Arts & Entertainment

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**Industry
Experience
Desired**

- ☐ Lodging and Foodservice
- ☐ Admin Svcs (incl Waste Mgmt)
- ☐ Ag/Forestry/Fishing/Hunting
- ☐ Arts, Entertainment & Rec
- ☐ Banking and Finance
- ☐ Chemicals/Plastics/Pharma Mfg
- ☐ Construction
- ☐ Educational Services
- ☐ Non-durable Mfg incl Food
- ☐ Health Care & Social Assist
- ☐ High-Tech Industries
- ☐ Information & Media
- ☐ Insurance & Investment Funds
- ☐ Machinery & Elec Eqpt Mfg
- ☐ Holding Company Mgmt Svcs
- ☐ Material/Metal Mfg & Products
- ☐ Mining (including Oil & Gas)
- ☐ Non-profit Organizations
- ☐ Professional/Sci-Tech Svcs
- ☐ Public Administration
- ☐ Real Estate & Rental/Leasing
- ☐ Retail Trade
- ☐ Transportation Services
- ☐ Transport/Aerospace Eqpt Mfg
- ☐ Unclassified Establishments
- ☐ Utilities
- ☐ Wholesale Trade

Save & Continue

Cancel Page & Exit

FIG. 5c*Heath & Olen*

8/93

**Company &
Function
Experience
Profile**

Are there specific companies you
would like us to target? List
companies:

Are there specific companies that
are off limits to this engagement?
List companies:

Are there specific classifications of
companies you would like us to
target?

- ☐ Fortune 500
☐ Most Admired
☐ Global 500
☐ Top 500 Private
☐ Law Firms
☐ Accounting Firms
☐ Consulting Firms

Would you like us to focus on a
particular size of company?

Select

What are the minimum years of
experience the ideal candidate
should have?

What are the minimum years of
experience the ideal candidate
should have in the relevant function
(e.g. finance):

What are the minimum years of
experience the ideal candidate
should have in the relevant position
(e.g. controller):

FIG. 5d

Marked as Clerk

9/93

**Educational
requirements/qualifications:**

	n/a	desired	required	Desired Major (optional)
BA:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
BS:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
JD:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
MA:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
MBA:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
MD:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
MPA:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
MS:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
MS Eng:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
PhD:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Professional Certifications: n/a Desired Required

Certified Public Accountant:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional Engineer:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial/Securities:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legal:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medical:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save & Continue

Cancel Page & Exit

FIG. 5e



1/2/99 10:00 AM

10/93

Enter the compensation details of the position.

**Compensation
Guidelines**Expected base salary: Annual bonus payment (target): % of baseStock options: ☐ Yes ☒ No

Describe stock

option plan:  Vacation: ☐ 2 weeks☐ 3 weeks☐ 4 weeks+Medical benefits: ☐ Yes ☒ NoDental benefits: ☐ Yes ☒ NoCar allowance: ☐ Yes ☒ No

Monthly car

allowance amount

\$:

401k: ☐ Yes ☒ No401k matching amount: %Sign-on bonus: ☐ Yes ☒ No

Sign-on bonus

amount \$:

Relocation

reimbursement: ☐ Yes ☒ No

Relocation amount

\$:

Tuition

reimbursement: ☐ Yes ☒ No

Tuition amount \$:

Other

compensation:  **Save & Continue****Cancel Page & Exit**FIG. 5f*Handwritten signature*

11/93

Please allocate 100 points across the various search parameters to reflect your desired weighting.

**Weight of
Search
Parameters****Points
Allocated**

Scope of Activities

Challenges

Industry Experience

Specific Company

Company Size

Years of Experience Total/Function

Years of Experience In Desired Position

Education

Professional Certification

Company Class

Must total 100

FIG. 5g*Handwritten signature or initials.*

12/93

With which situations or challenges should the successful candidate have experience? Check up to 3 items.

Challenges

- ☐ Rapidly changing environment
- ☐ Severe margin pressure
- ☐ Fast growth
- ☐ Post-merger/acquisition integration
- ☐ Turnaround
- ☐ Downsizing the work force
- ☐ Major new systems initiative
- ☐ Resource constraints/long work hours
- ☐ Pay for performance
- ☐ Empowered/results oriented
- ☐ Focus on market share increase
- ☐ Be number 1 or number 2 in industry
- ☐ Bottom line oriented
- ☐ High turnover of senior company executives

Other Challenges:

--

Save & Continue

Cancel Page & Exit

FIG. 6a

Revised 12/93

13/93

Scope of ActivitiesPoints
AllocatedPerforming advanced or specialized test and other related laboratory techniques ☐Initiating quality-control measures and monitoring work quality for compliance with laboratory standards ☐Managing the testing processes, evaluating testing methodologies, checking and confirming test results and approving reports ☐Maintaining records for federal, state and other appropriate license accreditation. Monitoring adherence to safety regulations ☐Conducting surveys, statistical reports, studies and research for hospital management ☐Monitoring, recommending and overseeing equipment procurement and repair. ☐Overseeing staff and activities in laboratory, including assigning and distributing work, determining priorities and scheduling ☐Hiring, evaluating and managing laboratory staff ☐Creating, implementing and communicating performance criteria ☐Maintaining currency on trends in the competitive, regulatory and multi-state legal environments ☐

Additional Requirements:

Software Packages:

Save & Continue

Cancel Page & Exit

FIG. 6b

Bertie A. Clark

14/93

Cultural Fit Assessment - Part 1 of 2

The results of this Assessment will help identify candidates who have the desired characteristics for this position. This Assessment is divided into seven sections. Please choose from the scale the degree to which each characteristic is or is not desired. You must indicate a preference for each characteristic.

Decision Making and Problem Solving

Very Little Little Great Very Great

Performing quantitative analyses
Performs mathematical and arithmetic calculations quickly and accurately.

☐ ☐ ☐ ☐ ☐ ☐ ☐

Thinking abstractly Reasons beyond immediate facts to identify larger patterns and to draw broad and accurate conclusions.

☐ ☐ ☐ ☐ ☐ ☐ ☐

Conceptualizing broadly Handles problems that cross many functional and business boundaries.

☐ ☐ ☐ ☐ ☐ ☐ ☐

Openness to new information and ideas Responds positively to new information and ideas.

☐ ☐ ☐ ☐ ☐ ☐ ☐

Generating ideas Produces new, innovative, or unusual solutions to problems.

☐ ☐ ☐ ☐ ☐ ☐ ☐

Synthesizing/integrating information Pulls together and integrates disorganized and disparate information to identify trends or to identify problems before they occur.

☐ ☐ ☐ ☐ ☐ ☐ ☐

Evaluating ideas and alternatives Objectively evaluates facts and information without being biased by personal preferences and relationships.

☐ ☐ ☐ ☐ ☐ ☐ ☐

FIG. 6c

Frankie & Gertie

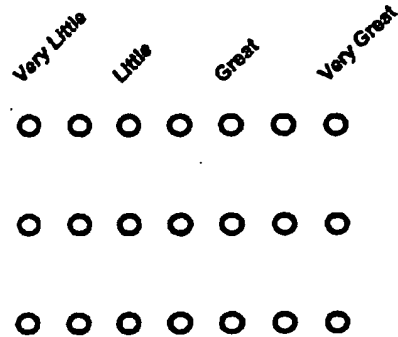
15/93

Planning

Strategic planning Produces long-range plans with objectives and strategies clearly identified.

Tactical planning Produces realistic and well-organized plans and schedules to accomplish tasks.

Adapting to change Modifies plans and objectives readily according to changing circumstances and situations.

**Implementing Plans and Tasks**

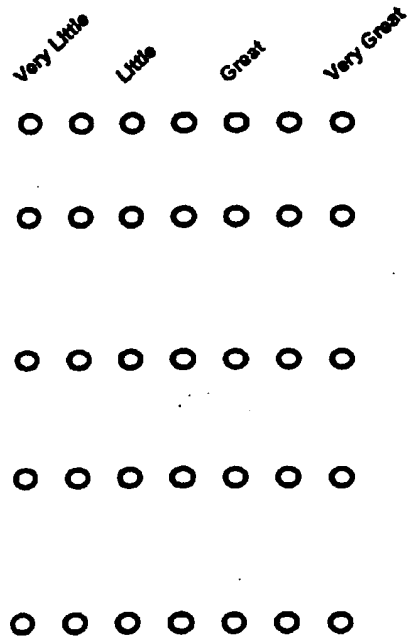
Putting plans into action Follows through and takes immediate steps to put agreed upon plans into action.

Organizing and orchestrating events Brings together work resources, tools, schedules and people as needed to accomplish objectives.

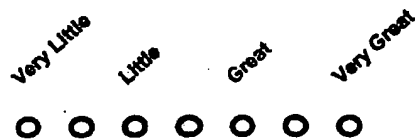
Responding to feedback Uses feedback and critical input from others to adjust own work methods and behavior.

Cautious evaluation Responds carefully, in an analytic, unhurried and unemotional way, to new input and information about opportunities and strategies.

Maintaining high energy Able to sustain energy during frequent and very prolonged periods of very intense work.

**Implementing Plans and Tasks (cont.)**

Persisting in actions and plans Retains focus on established plans and actions over long periods of time, involving years or many months.

FIG. 6d

Michael A. Olshak

16/93

Cultural Fit Assessment - Part 2 of 2
 (Organizational Culture profile - to be completed by at least three from department)

Each organization has an unique culture and structure. Individuals have varying degrees of success depending upon whether an organization's culture is "right" for them. For each question please use the scale to indicate as accurate as possible the culture and work style of your organization. You must leave no questions unanswered.

	Very Little	Little	Moderate	Great	Very Great
1 To what extent does your organization aim to identify and take advantage of new business ideas and opportunities as they arise.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2 To what extent is your organization determined to grow and expand by whatever means possible, including mergers and acquisitions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3 To what extent is your organization committed to offering only products and services of the highest quality and reliability?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4 To what extent does your organization aim to develop a broad range of highly creative products and services?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5 To what extent does your organization have a flat structure with few levels of hierarchy?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6 To what extent does your organization have clear and formal areas of responsibility, reporting relationships, and lines of command between superior and subordinate?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7 To what extent does your organization consist of informal and temporary teams that change frequently?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 6e

17/93

Handling Pressures

Coping with uncertainty Remains calm and effective when information and work demands are unclear, shifting, and/or unpredictable.

Very Little Little Great Very Great

○ ○ ○ ○ ○ ○ ○

Handling complexity Effectively handles large amounts of detailed, complicated, and time-consuming information (both quantitative and verbal).

○ ○ ○ ○ ○ ○ ○

Dealing with risk Retains confidence and thinking capability when faced with potential threats and the need to take calculated risks.

○ ○ ○ ○ ○ ○ ○

Coping with time pressure Calmly handles very high workload when faced with many, important, short-term deadlines.

○ ○ ○ ○ ○ ○ ○

Handling stress Reasonably and calmly handles situations involving interpersonal and emotional conflict, and frustration.

○ ○ ○ ○ ○ ○ ○

Leadership

Controlling and directing others Closely monitors others' work and gives frequent, direct instructions to assure that objectives are accomplished.

Very Little Little Great Very Great

○ ○ ○ ○ ○ ○ ○

Confronting others Openly and directly confronts problems and takes a strong, "no nonsense" stand to settle disputes or to deal with others' performance problems or deficiencies.

○ ○ ○ ○ ○ ○ ○

Persuading and motivating others Very capably makes use of

○ ○ ○ ○ ○ ○ ○

FIG. 6f

Thomas A. McKelvey

18/93

persuasive or indirect methods to build and sustain motivation, energy and commitment in others.

Communicating expectations
Assures that others know clearly what is expected or needed from them to complete tasks and accomplish objectives. Does not wait until after-the-fact to make things clear.

○ ○ ○ ○ ○ ○ ○

Giving performance feedback
Regularly and frequently provides others with information about their performance. Assists others in identifying clearly where their performance exceeds, meets, or falls short of objectives, standards, or others' expectations and needs.

○ ○ ○ ○ ○ ○ ○

Communicating

Exercising verbal skills Uses an extensive and broad-ranging vocabulary.

Very Little Little Great Very Great

○ ○ ○ ○ ○ ○ ○

Articulating complex ideas and information Orally communicates complex ideas and information in a way that others clearly understand what is meant.

○ ○ ○ ○ ○ ○ ○

Communicating (cont.)

Listening Frequently takes time to give careful attention to what others have to say, and shows that others' input is understood and appreciated.

Very Little Little Great Very Great

○ ○ ○ ○ ○ ○ ○

Managing Relationships

Initiating relationships Very readily makes new relationships with people without waiting for others to make the first move.

Very Little Little Great Very Great

○ ○ ○ ○ ○ ○ ○

Maintaining contact with others
Diligently keeps up contacts with people. Takes the initiative to stay in touch and in communication and remains easily accessible to others.

○ ○ ○ ○ ○ ○ ○

FIG. 6g

Handwritten signature

19/93

Responding to others' needs Shows warmth, appreciation, and responsiveness when dealing with the needs of others.



Cooperating Readily modifies plans to accommodate others' work and needs. Finds ways to keep own objectives in line with others' plans and needs.



Resolving conflicts Takes action to assist in settling disputes and reaching agreements. Resolves differences with other people effectively, and helps others to resolve their differences.



Facilitating meetings Speaks up readily in formal or informal gatherings to bring out information from others, to contribute own ideas, and to make the exchange of information, ideas, and/or plans flow smoothly.



FIG. 6h

Handwritten signature or mark

20/93

Managing Relationships (cont.)

Reading people Perceives other people's capabilities, preferences, and talents in-depth and with an exceptional level of accuracy, without being unduly influenced by "first impressions" and own personal biases and preferences. Possesses an in-depth understanding of how individual people differ.

Very Little Little Great Very Great

○ ○ ○ ○ ○ ○ ○

Working Independently Performs work very well without relying on supervision or input and assistance from others.

○ ○ ○ ○ ○ ○ ○

END: Cultural Fit Assessment - Part 1 of 2

FIG. 6i

Handwritten signature

21/93

Cultural Fit Assessment - Part 2 of 2**(Organizational Culture profile - to be completed by at least three from department)**

Each organization has an unique culture and structure. Individuals have varying degrees of success depending upon whether an organization's culture is "right" for them. For each question please use the scale to indicate as accurate as possible the culture and work style of your organization. You must leave no questions unanswered.

	Very Little	Little	Moderate	Great	Very Great
1 To what extent does your organization aim to identify and take advantage of new business ideas and opportunities as they arise.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2 To what extent is your organization determined to grow and expand by whatever means possible, including mergers and acquisitions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3 To what extent is your organization committed to offering only products and services of the highest quality and reliability?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4 To what extent does your organization aim to develop a broad range of highly creative products and services?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5 To what extent does your organization have a flat structure with few levels of hierarchy?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6 To what extent does your organization have clear and formal areas of responsibility, reporting relationships, and lines of command between superior and subordinate?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7 To what extent does your organization consist of informal and temporary teams that change frequently?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 6j

Handwritten signature/initials

22/93

	Very Little	Little	Moderate	Great	Very Great
8 To what extent is your organization structured in a matrix where some people report in two directions (such as to a functional manager as well as to a project manager)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9 To what extent are the technical competencies and experience of the employees viewed as important in your organization?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10 To what extent is the personal development of the employees viewed as important in your organization?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11 To what extent is the leadership potential of the employees viewed as important in your organization?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12 To what extent is the quick adaptability of the employees viewed as important in your organization?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13 To what extent does your organization motivate its employees by offering them markedly higher salaries, bonuses, and benefits the higher the level they reach in the organization?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14 To what extent does your organization motivate its employees by giving them more opportunities to develop and apply their creativity?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15 To what extent does your organization motivate its employees by offering new, challenging, temporary assignments?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16 To what extent does your organization motivate its employees by recognizing their expertise through, for example, asking them for their advice in important decisions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 6k

Theodore A. Clark

23/93

	Very Little	Little	Moderate	Great	Very Great
17 To what extent does your organization reward successful employees with promotions to managerial positions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18 To what extent does your organization reward employees by giving them more autonomy to take risks?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19 To what extent does your organization reward successful employees by giving them work assignments that enable them to broaden their skills?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20 To what extent does your organization reward specialists by giving them extra resources, or their own budgets, and privileges?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21 Your organization is primarily aiming to:					
a. enter business areas that are related to the existing business;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. maintain its present market(s), customers, and operations;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. compete for larger market shares and expand to international markets;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. quickly identify and flexibly adapt to changing customer preferences.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22 The main competitive advantage of your organization is to offer:					
a. fast and simple solutions to customer problems;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. high quality and reliability;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. a broad range of complementary product and services;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. competitive prices through cost-efficient large scale operations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 6I

24/93

	Very Little	Little	Moderate	Great	Very Great
23 The primary future vision of your organization is to:					
a. stay focused on being regarded as the best within the existing industry;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. become the fastest to respond to new opportunities;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. be the largest and leading firm in its market;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. become the most innovative product developer of the industry.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24 The main competencies of your organization is:					
a. strong leadership and efficiency;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. indepth specialized knowledge and expertise;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. flexibility and networking with various customers and organizations;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. renewal and breadth of your skills and knowledge.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
25 The organization consists primarily of:					
a. self-managing work groups and complex projects;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. many hierarchic levels that make up a tall pyramid;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. different specialized functional departments, such as sales, production, and development units;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. small and temporary groups with people that come together to perform tasks and solve problems as they occur.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
26 The authority of individuals in your organization is mostly based on:					
a. handling change and dealing with various people;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. one's rank in the formal hierarchy;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. having experience and technical competence;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. being creative and good at teamwork.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 6m

Heske - Okeke

25/93

	Very Little	Little	Moderate	Great	Very Great
27 Your organization's structure is mainly:					
a. developed through major reorganizations and creation of new projects;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. divided into several competitive business-oriented units;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. an informal network that frequently changes;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. quite stable over time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
28 In your organization, it is particularly important that the employees:					
a. are creative;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. are particular about quality;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. can easily get in touch with new people (such as having large personal networks);	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. are cost-conscious and contribute to sales increases.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
29 Your organization values mostly the employees'					
a. leadership abilities;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. specialist competencies;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. generalist competencies;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. customer adaptiveness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
30 The organization rewards the employees primarily based on:					
a. seniority and stable loyalty;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. cooperativeness in work groups and projects;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. fast learning and mobility;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. achieved financial results and efficiency.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 6n

26/93

	Very Little	Little	Moderate	Great	Very Great
31 Your organization rewards the employees by offering opportunities for:					
a. promotion and leadership development;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. refined technical competence and specialist recognition;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. participation in creative and exciting project teams;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. free and independent work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
32 In addition to ordinary salary, the employees are mainly offered:					
a. swift cash bonuses for special accomplishments;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. profit bonuses through, for example, stocks and options;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. long-term benefits, such as pensions, health care, and insurance;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. leaves and compensation for education that stimulates personal development.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
33 The job content itself is motivating by mostly offering:					
a. stable and secure employment;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. a wide variety of work activities;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. power and status;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. job rotation that broadens the competence to related areas.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
34 Overall, most of the organization's employees seem to consider that:					
a. the present strategy is effective;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. the present organizational structure is well-functioning;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. the present performance appraisal system (that is, what the organization evaluates and rewards) is relevant;	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. they are motivated and satisfied.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 60

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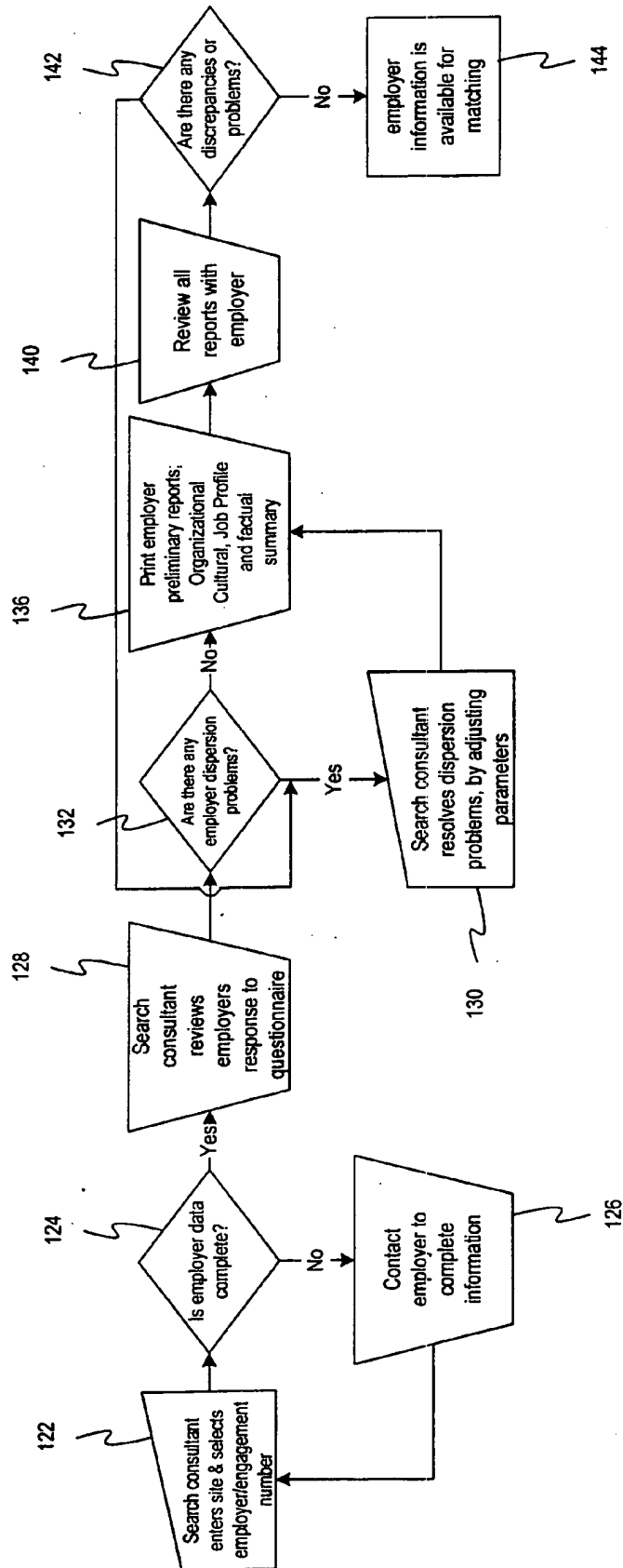
	Very Little	Little	Moderate	Great	Very Great
35 To what extent do you feel certain about your answers to the 34 questions above?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
36 To what extent do you believe that your answers are similar to those of the other employees?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

END: Cultural Fit Assessment - Part 2 of 2

FIG. 6p

Harris & Clark

28/93

FIG. 7*Back to 28/93*

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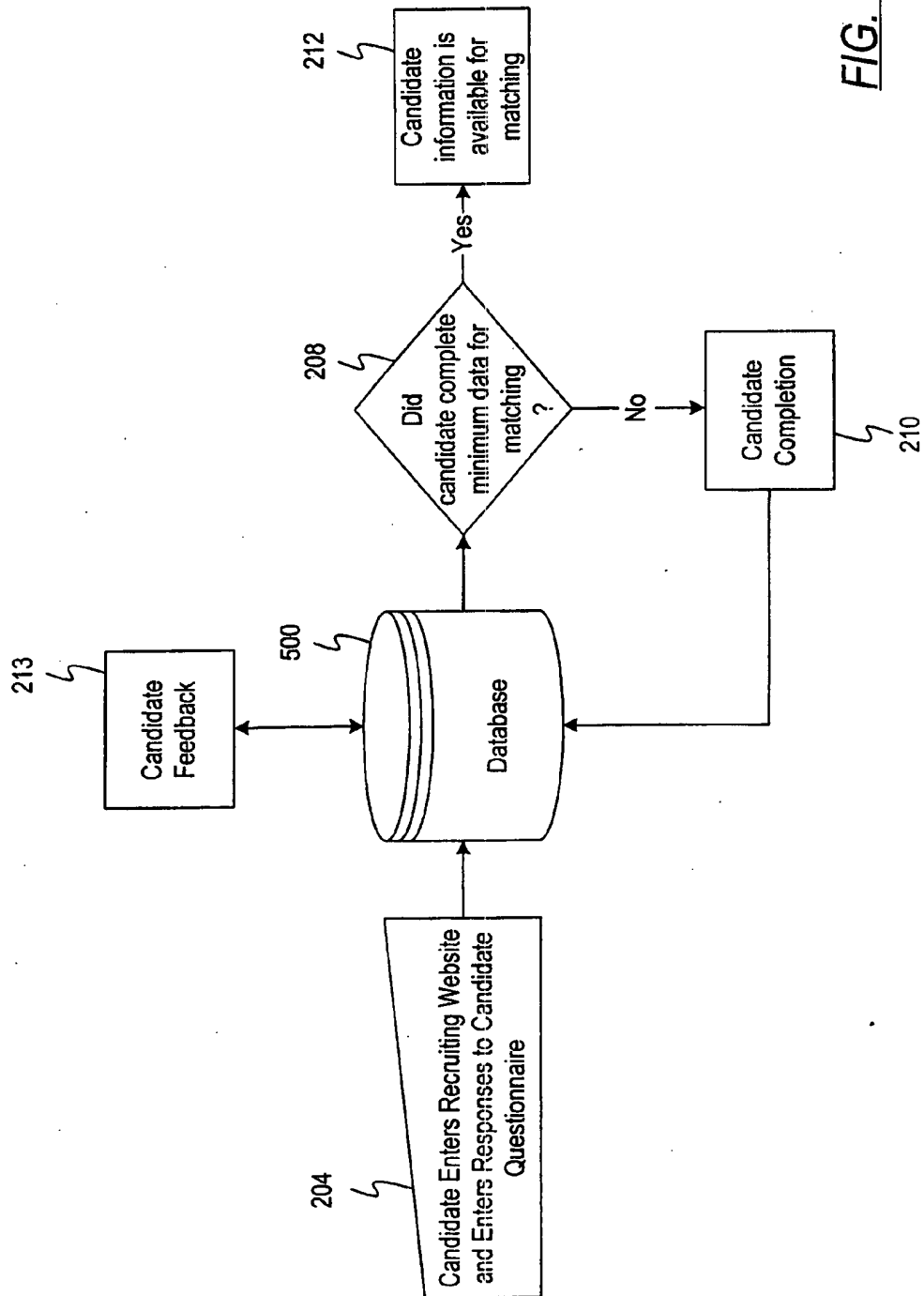



FIG. 8

30/93

Please enter the following information to complete your user registration.

User Registration

Your User ID	<input type="text"/>
Choose a Password	<input type="text"/>
Re-enter Password	<input type="text"/>
Salutation	Select 
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/>

- What type of position do you currently occupy or would you consider?
- ☒ Commerce, Industry or Corporate
 - ☐ Financial Services
 - ☐ Healthcare
 - ☐ Insurance
 - ☐ Professional Service Firm
 - ☐ Currently a Student
















FIG. 9a

Handwritten signature or mark.

31/93

**Desired
Position**

Retail	Select from list	
Public Relations	Select from list	
Operations	Select from list	
Accounting/Finance	Select from list	
Engineering	Select from list	
Executive/General Management	Select from list	
Human Resources	Select from list	
Information Technology	Select from list	
Legal (In-House)	Select from list	
Manufacturing	Select from list	
Marketing	Select from list	
Sales	Corp Mktg & Sales Exec	
Real Estate	Select from list	
Other	<input type="text"/>	

Levels

- ☒ Executive
☐ Vice President
☐ Director
☐ Manager
☐ Supervisor

☐ Are there any other positions for which you would like to be considered? (list to follow)

FIG. 9b

Images of Original

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Please enter your contact address, phone number and e-mail information. Additionally, please indicate your preferred contact location and method. Our policy is to maintain complete confidentiality on your personal data. No information will be released to any outside party unless you explicitly instruct us to do so.




<input type="checkbox"/>	Address	<input type="text"/>
		<input type="text"/>
	City	<input type="text"/>
	State/Province	Select from list <input type="text"/>
	Country	United States <input type="text"/>
	Zip/Postal Code	<input type="text"/>
<hr/>		
U.S. Citizen or Permitted to work in the U.S.? <input type="radio"/> Yes <input checked="" type="radio"/> No		
Canadian Citizen or Permitted to work in Canada? <input type="radio"/> Yes <input checked="" type="radio"/> No		
<hr/>		
	Home Phone	<input type="text"/>
	Home Fax	<input type="text"/>
	Office Phone	<input type="text"/>
	Office Fax	<input type="text"/>
<hr/>		
	Home E-Mail	<input type="text"/>
	Office E-Mail	<input type="text"/>
<hr/>		
You may call me at		<input type="radio"/> Home
		<input type="radio"/> Office
		<input checked="" type="radio"/> Any of Above
		<input type="radio"/> None of Above
<hr/>		
You may E-Mail me at		<input checked="" type="radio"/> Home
		<input type="radio"/> Office
		<input type="radio"/> My IN-BOX at futurestep site
		<input type="radio"/> Any of Above
<hr/>		
<input type="checkbox"/> Send me information about futurestep products and services		
<input type="checkbox"/> I would like to be contacted by futurestep		




FIG. 9c




Inches & Feet

33/93

**Academic
Background &
Certifications**

UniversityName	<input type="text"/>
City	<input type="text"/>
State	Select a state 
Country	United States 
Degree Earned	Select a degree 
Major	<input type="text"/>
Graduation Year	<input type="text"/>
Grade Point Average	<input type="text"/>

UniversityName	<input type="text"/>
City	<input type="text"/>
State	Select a state 
Country	United States 
Degree Earned	Select a degree 
Major	<input type="text"/>
Graduation Year	<input type="text"/>
Grade Point Average	<input type="text"/>

UniversityName	<input type="text"/>
City	<input type="text"/>
State	Select a state 
Country	United States 
Degree Earned	Select a degree 
Major	<input type="text"/>
Graduation Year	<input type="text"/>
Grade Point Average	<input type="text"/>


Professional Certification	Select a Certificate 
Other Certifications	<input type="text"/>

FIG. 9d

Handwritten signature or mark.

34/93

**Employment
History**Company
Name Title Equivalent
Level Start Date
(Mo/Yr) End date
(Mo/Yr) Functional
Area People
reporting
to you
(direct and
indirect) Industry **Parent Company (if any)**Name Size FIG. 9e

R. S. S. S. S.

35/93

Indicate any geographic preferences you have regarding relocation and/or employment location.

<input checked="" type="checkbox"/>	<input type="radio"/> New England	Select one
	<input type="radio"/> Middle Atlantic	Select one
	<input type="radio"/> Middle Southeast	Select one
	<input type="radio"/> Lower Southeast	Select one
	<input type="radio"/> Great Lakes	Select one
	<input type="radio"/> Central Plains	Select one
	<input type="radio"/> South Central	Select one
	<input type="radio"/> Upper Mountain	Select one
	<input type="radio"/> Lower Mountain	Select one
	<input type="radio"/> Pacific Northwest	Select one
	<input type="radio"/> Pacific Southwest	Select one
	<input type="radio"/> Western Canada	Select one
	<input type="radio"/> Eastern Canada	Select one
	<input type="radio"/> Central Canada	Select one
	<input type="radio"/> Northern Canada	Select one
	<input type="radio"/> Other Country	Select one
	<input type="radio"/> No Preference	
	<input type="radio"/> Not willing to relocate	
<div>Save & Continue Cancel & Exit</div>		

FIG. 9f

Bates & Clerk

36/93

Compensation

Select current annual base salary

Increase percentage in base salary from prior year

Prior Year Actual Bonus

Current year target bonus

Stock Option Plan ☒ Yes ☐ No

FIG. 9g

Handwritten signature

37/93

We would like to learn more about your current and former positions and employers. Please enter more detailed industry and job function data below along with an estimate of the size of your direct employer (not the ultimate parent company).

- 12/1996-6/1999	
<input checked="" type="checkbox"/>	Industry <input type="text" value="Select From List"/>
	Function <input type="text" value="Select From List"/>
	Company Size <input type="text" value="Select From List"/>
<input type="button" value="Save & Continue"/> <input type="button" value="Cancel"/>	

FIG. 9h

Heads & Olets

38/93

Indicate the languages in which you are proficient, as well as your level of proficiency. (Optional)

<input checked="" type="checkbox"/>	English	Select Level
	French	Select Level
	German	Select Level
	Italian	Select Level
	Spanish	Select Level
	Dutch	Select Level
	Mandarin	Select Level
	Cantonese	Select Level
	Japanese	Select Level

Other Languages

International Work Experience:
Worked internationally or have significant international business exposure.

☒ None
☐ Less than one year
☐ One or more years

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Printed: 10/10/1999

FIG. 9i

Heidi Clark

39/93

☐ x

Please indicate your relocation preferences by ranking the following two options.

Enter a 1 for the most desirable option; enter a 2 for the least desirable option.

Geographic location

☐ No relocation

☐ Relocate to more desirable location than current

FIG. 9j

Handwritten signature

41/93

Check a maximum of three business environment experiences.

**Business
Environment
Experience**

- ☐ Rapidly changing environment
- ☐ Severe margin pressure
- ☐ Fast growth
- ☐ Post-merger/acquisition integration
- ☐ Turnaround
- ☐ Downsizing the work force
- ☐ Major new systems initiative
- ☐ Resource constraints/long work hours
- ☐ Pay for performance
- ☐ Empowered/results oriented
- ☐ Focus on market share increase
- ☐ Be number 1 or number 2 in industry
- ☐ Bottom line oriented
- ☐ High turnover of senior company executives

Save**Cancel**FIG. 10b

B. J. & C. J.

42/93

Halerville Case

You may continue to refer to this case as you answer the questions in this exercise.

The Vice President in Charge of Human Resources has just told you that you have been transferred from a position in the home office of Rush Drugs, Inc., to a managing position in the Halerville branch.

Nominally, the two positions are of exactly equal importance, but you have cause to wonder why you should have been transferred.

About four months ago you made a decision for the company that was essentially a risky gamble and it came off well. You were never able to find out exactly what your superiors thought of your move but you do know that they do not all agree in their opinion about it.

You are wondering whether your transfer constitutes a reprimand or an encouragement.

The facts (Items A through F) at your disposal are:

Item A Halerville is a large city with, as yet, small drug sales.

Item B The previous branch manager of Halerville, who was a man of strong decisions, was very much liked by his employees. They seem to think that "there's no one like him."

Item C Sales to smaller towns around Halerville are very badly organized. It is with just such a problem that you took your gamble.

Item D There is a probability of a trucking strike in Halerville. This would involve long, drawn-out negotiations for transportation.

Item E You have heard the Second Vice President say that what the Halerville branch needed was a "good strong hand."

Item F The change in position involves a salary cut of \$1,000, but there is a slight possibility of making this up or even exceeding it on a commission basis.

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FIG. 10c

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In completing the questionnaire, you should work quickly and make sure that you leave no questions unanswered. Also, please note that you may need to scroll with your mouse to keep the information in view while you answer the questions.

Do you think the transfer is an encouragement (A) or a reprimand (B)?

1. _____ A C B C

How confident do you feel about the choice you made in question 1?

extremely
certain

extremely
uncertain

2. _____ C O G C C C C

How relevant do you think the items are to your choice in question 1?

completely
irrelevant

very
relevant

[illegible]

To what degree do you feel that these items support your choice in question 1?

		strongly opposes my view					strongly supports my view
9.	Item A	C	C	C	C	C	C
10.	Item B	C	C	C	C	C	C
11.	Item C	C	C	C	C	C	C
12.	Item D	C	C	C	C	C	C
13.	Item E	C	C	C	C	C	C
14.	Item F	C	C	C	C	C	C

To what degree do you feel that these items could be used to support either choice in question 1?

		could easily support BOTH CHOICES – mine and the other				could only support ONE CHOICE – mine or the other		
15.	Item A	C	C	C	C	C	C	C
16.	Item B	C	C	C	C	C	C	C
17.	Item C	C	C	C	C	C	C	C
18.	Item D	C	C	C	C	C	C	C

FIG. 10d

Red Oak

45/93

Halerville Case

You may continue to refer to this case as you answer the questions in this exercise.

The Vice President in Charge of Human Resources has just told you that you have been transferred from a position in the home office of Rush Drugs, Inc., to a managing position in the Halerville branch.

Nominally, the two positions are of exactly equal importance, but you have cause to wonder why you should have been transferred.

About four months ago you made a decision for the company that was essentially a risky gamble and it came off well. You were never able to find out exactly what your superiors thought of your move but you do know that they do not all agree in their opinion about it.

You are wondering whether your transfer constitutes a reprimand or an encouragement.

Item G The Vice President in Charge of Personnel strongly favors conservative policies.

Item H The Operations Manager of the branch is known to be extremely stubborn and is supposed to be in almost complete control.

Item A Halerville is a large city with, as yet, small drug sales.

Item B The previous branch manager of Halerville, who was a man of strong decisions, was very much liked by his employees. They seem to think that "there's no one like him."

Item C Sales to smaller towns around Halerville are very badly organized. It is with just such a problem that you took your gamble.

Item D There is a probability of a trucking strike in Halerville. This would involve long, drawn-out negotiations for transportation.

Item E You have heard the Second Vice President say that what the Halerville branch needed was a "good strong hand."

Item F The change in position involves a salary cut of \$1,000, but there is a slight possibility of making this up or even exceeding it on a commission basis.

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FIG. 10f

Revised 10/98

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Item G and Item H are the new facts at your disposal.

Given this new information as well as the original items (you may wish to refer to the case again) do you still see the transfer as an encouragement?

36. _____ Yes ☐ No ☐
How confident do you feel about the choice you just made?

extremely
certain

extremely
uncertain

37. _____ ☐ ☐ ☐ ☐ ☐ ☐ ☐
Without consulting your previous ratings, how relevant do you think all information items are to your choice in question 36?

completely
irrelevant

very
relevant

38. Item A	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
39. Item B	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
40. Item C	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
41. Item D	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
42. Item E	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
43. Item F	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
44. Item G	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
45. Item H	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 10g

Revised 10/94

47/93

This questionnaire presents you with a series of descriptions of behavior and points of view. You will be asked to choose from the scale next to each description to show how characteristic or uncharacteristic the description is of you. There are 60 items in this questionnaire. There are no right or wrong answers. Please work quickly and leave no questions unanswered.

#	ITEM	least	most
1	Your motives and plans are complicated compared to those of the average person.	<input type="radio"/>	<input type="radio"/>
2	You feel we have little control over what happens to us.	<input type="radio"/>	<input type="radio"/>
3	You feel one can develop successful personal qualities and, at times, influence events and persons which strongly affect one's career.	<input type="radio"/>	<input type="radio"/>
4	In forming impressions of others, you use basically the same few, reliable categories.	<input type="radio"/>	<input type="radio"/>
5	In forming impressions of others, you use many categories that vary from person to person.	<input type="radio"/>	<input type="radio"/>
6	In solving problems, you function extremely well when both the problem and solutions are clear-cut.	<input type="radio"/>	<input type="radio"/>
7	In solving problems, you function extremely well when neither problem nor solution is clear.	<input type="radio"/>	<input type="radio"/>
8	You tend to view the world as being too simple.	<input type="radio"/>	<input type="radio"/>
9	You tend to view the world as being as complex as you like it.	<input type="radio"/>	<input type="radio"/>
10	You are strongly attracted to very complicated persons.	<input type="radio"/>	<input type="radio"/>
11	You are strongly attracted to somewhat uncomplicated persons.	<input type="radio"/>	<input type="radio"/>
12	You are strongly attracted to very uncomplicated persons.	<input type="radio"/>	<input type="radio"/>
13	You enjoy being in groups with few fixed rules and many diverse personalities.	<input type="radio"/>	<input type="radio"/>
14	You enjoy being in groups with relatively fixed rules but diverse personalities.	<input type="radio"/>	<input type="radio"/>
15	You enjoy being in groups with relatively fixed rules and similar personalities.	<input type="radio"/>	<input type="radio"/>
16	In considering problems and situations, you are hesitant to solve problems that involve many points of view.	<input type="radio"/>	<input type="radio"/>

FIG. 10h

48/93

- 17 In considering problems and situations, you are moderately attracted to problems that involve many points of view. ☐ ☐ ☐ ☐ ☐
- 18 In considering problems and situations, you greatly enjoy and seek out problems that require many points of view. ☐ ☐ ☐ ☐ ☐
- 19 In confusing or ambiguous situations, you put off decisions indefinitely. ☐ ☐ ☐ ☐ ☐
- 20 In confusing or ambiguous situations, you consider all aspects of the problem, then reach a tentative decision which might be changed as you reconsider the problem. ☐ ☐ ☐ ☐ ☐
- 21 You feel extremely happy when you have a large number of related but distinct projects underway. ☐ ☐ ☐ ☐ ☐
- 22 You feel extremely happy when you have many distinct, unrelated projects going. ☐ ☐ ☐ ☐ ☐
- 23 You feel extremely happy when you have a few related projects underway. ☐ ☐ ☐ ☐ ☐
- 24 In social activities, at gatherings and at work, you like dealing with one person at a time, and preferably with a person like yourself. ☐ ☐ ☐ ☐ ☐
- 25 In social activities, at gatherings and at work, you like dealing with people one at a time, but each can be quite different. ☐ ☐ ☐ ☐ ☐
- 26 In social activities, at gatherings and at work, you like trying to blend people who are quite different. ☐ ☐ ☐ ☐ ☐
- 27 In social activities, at gatherings and at work, you like mixing individuals of vastly different make-ups in the same situation. ☐ ☐ ☐ ☐ ☐
- 28 When someone suggests that you should change your behavior, you listen, sometimes out of courtesy, but rarely do anything about the suggestion because most people are not justified in their criticisms. ☐ ☐ ☐ ☐ ☐
- 29 When someone suggests that you should change your behavior, you change if you think the other person is justified or has the proper authority, otherwise rejecting the suggestion. ☐ ☐ ☐ ☐ ☐
- 30 When someone suggests that you should change your behavior, you go along, if after careful consideration of the various interpretations of what the person said, the suggestion makes sense in terms of your view. ☐ ☐ ☐ ☐ ☐
- 31 If two people are disagreeing with each other, you tend to point out to the participants that if they saw the parts of their argument more objectively they would find that the parts add up to the real solution. ☐ ☐ ☐ ☐ ☐
- 32 If two people are disagreeing with each other, you tend ☐ ☐ ☐ ☐ ☐

FIG. 10i

R. Mark A. Clark

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to try settling it as quickly as you can in order to avoid people's feelings being hurt.

- 33 In evaluating a new or changed situation, you generally avoid discussing the situation with persons who have different points of view, since this just clouds the issue. ☐ ☐ ☐ ☐ ☐
- 34 In evaluating a new or changed situation, you look for diverse points of view, and often form several possible judgments that may or may not modify your previous outlook. ☐ ☐ ☐ ☐ ☐
- 35 When a considerable amount of new and apparently contradictory information becomes available on a topic about which you have a strong opinion, you pay little attention, because when you have a strong opinion it is usually well founded. ☐ ☐ ☐ ☐ ☐
- 36 When a considerable amount of new and apparently contradictory information becomes available on a topic about which you have a strong opinion, you are not affected by the new information, since you rarely take strong positions in any area. ☐ ☐ ☐ ☐ ☐
- 37 When a considerable amount of new and apparently contradictory information becomes available on a topic about which you have a strong opinion, you use the information to generate even more points of view about the issue, which could lead to seeing the issue in a new light. ☐ ☐ ☐ ☐ ☐
- 38 You easily sense the way in which the motives and ideas of others operate. ☐ ☐ ☐ ☐ ☐
- 39 You understand the motives and ideas of others only after thinking about them for a long time. ☐ ☐ ☐ ☐ ☐
- 40 You have considerable difficulty in understanding the motives and ideas of others. ☐ ☐ ☐ ☐ ☐
- 41 In making friends, you prefer those who are somewhat more like you in values and opinions. ☐ ☐ ☐ ☐ ☐
- 42 In making friends, you prefer those who are somewhat more unlike you in values and opinions. ☐ ☐ ☐ ☐ ☐
- 43 In making friends, you prefer those who are quite dissimilar from you in values and opinions. ☐ ☐ ☐ ☐ ☐
- 44 In making friends, you prefer a mix of some similar and some dissimilar in values and opinions. ☐ ☐ ☐ ☐ ☐
- 45 In selecting acquaintances, you use many criteria, with similarity in values and opinions not being of great consequence for you. ☐ ☐ ☐ ☐ ☐
- 46 In selecting acquaintances, you enjoy being with individuals somewhat like yourself in personality. ☐ ☐ ☐ ☐ ☐

FIG. 10j

Beck's IAT

50/93

- 47 In selecting acquaintances, you enjoy being with individuals quite dissimilar in personality. ☐ ☐ ☐ ☐ ☐
- 48 In selecting acquaintances, you enjoy being with some similar and some quite dissimilar. ☐ ☐ ☐ ☐ ☐
- 49 In selecting acquaintances, you use many criteria, similarity in personality not being of great consequence to you. ☐ ☐ ☐ ☐ ☐
- 50 In a discussion, you like taking a different point of view from your own. You learn more about your own view as well as others in this way. ☐ ☐ ☐ ☐ ☐
- 51 You feel it is all right for different people to have different views. However, you feel they should keep these views to themselves and not bother others with them. ☐ ☐ ☐ ☐ ☐
- 52 You prefer situations where there is a single problem with one possible solution. ☐ ☐ ☐ ☐ ☐
- 53 You prefer situations where there is a single problem with a number of possible solutions. ☐ ☐ ☐ ☐ ☐
- 54 You prefer situations where there are a number of different kinds of problems, each with more than one possible solution. ☐ ☐ ☐ ☐ ☐
- 55 You prefer situations where there are a number of different kinds of problems that can be solved in the same basic manner. ☐ ☐ ☐ ☐ ☐
- 56 Suppose that you had an opportunity to take an executive position with an organization that had many departments, each of which had different and sometimes irreconcilable conflicting interests, needs and personalities. (Assume your income is unaffected by this decision.) You would like to have responsibility for the entire organization. ☐ ☐ ☐ ☐ ☐
- 57 Suppose that you had an opportunity to take an executive position with an organization that had many departments, each of which had different and sometimes irreconcilable conflicting interests, needs and personalities. (Assume your income is unaffected by this decision.) You would like to run one department and represent this department on many interdepartmental committees. ☐ ☐ ☐ ☐ ☐
- 58 Suppose that you had an opportunity to take an executive position with an organization that had many departments, each of which had different and sometimes irreconcilable conflicting interests, needs and personalities. (Assume your income is unaffected by this decision.) You would like to run one department with participation in interdepartmental committees. ☐ ☐ ☐ ☐ ☐
- 59 In the field of international affairs, you agree that your country should maintain sufficient power to assure that its interests are protected in all areas. ☐ ☐ ☐ ☐ ☐
- 60 In doing work, you have liked having no direct ☐ ☐ ☐ ☐ ☐

FIG. 10k

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supervision, but someone to talk over problems with.



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FIG. 10I

Links to Oost

52/93

Part I: Career Patterns (Questions 1-18)

People differ in their perceptions of the ideal career. These differences are reflected in how often they would like to change career areas (for example, from accounting to marketing), the direction of movement; and in the kinds of activities their work involves. A "change" means from one type of work or position to another requiring a different set of skills and knowledge. For each of the items below please *click an option button* to indicate how much you would like your *ideal* career to involve each of the patterns described (assuming no limitations).

	#	ITEM	very little	very great
<input checked="" type="checkbox"/>	1	A new career area every one to four years.	<input type="radio"/>	<input type="radio"/>
	2	A new career area every five to ten years.	<input type="radio"/>	<input type="radio"/>
	3	A new career area after ten or more years.	<input type="radio"/>	<input type="radio"/>
	4	No career area change.	<input type="radio"/>	<input type="radio"/>
	5	Continual upward movement to higher levels of the organization.	<input type="radio"/>	<input type="radio"/>
	6	Staying in one general occupational area.	<input type="radio"/>	<input type="radio"/>
	7	Lateral movement into new occupational areas.	<input type="radio"/>	<input type="radio"/>
	8	No consistent direction.	<input type="radio"/>	<input type="radio"/>
	9	More managerial, administrative, or supervisory activities.	<input type="radio"/>	<input type="radio"/>
	10	More complex technical activities.	<input type="radio"/>	<input type="radio"/>
	11	Replacement of old activities with entirely different activities.	<input type="radio"/>	<input type="radio"/>
	12	Different activities requiring skills and knowledge that build on previously acquired skills and knowledge.	<input type="radio"/>	<input type="radio"/>
	13	Increasingly specialized activities and tasks.	<input type="radio"/>	<input type="radio"/>
	14	Activities requiring increasing refinement of present skills and knowledge.	<input type="radio"/>	<input type="radio"/>
	15	Major change in career area typically every five to ten years. These changes involve moves to different but related skill areas and activities (i.e., the new skills build upon existing skills). These changes may involve either lateral or upward movement.	<input type="radio"/>	<input type="radio"/>
	16	Staying in one general career area and continually	<input type="radio"/>	<input type="radio"/>

FIG. 10m

Banks et al.

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moving up to higher levels in the organization or occupational group. Positions not representing upward movement are only desirable if they provide the basis for later upward movement.

17 Staying in one chosen career area or field. The principal activities involve exercising or refining skills and capabilities in that career area, rather than moving on to different career areas or ever higher levels in an organization.

18 Major changes in career area every 1 to 4 years. These changes may not include moving up a ladder, but involve getting into new types of work that require using new skills, and that involve activities very different from those of previous career areas.

Part II: Career Decision Factors (Questions 19-38)

People differ in factors that guide their career-related decisions. For each of the following items please click an option button to indicate how much the particular factor described is likely to guide your future career decisions.

#	ITEM	very little					very great
19	Gain high prestige and status.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20	Remain free from organizational constraints.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21	Ability to do your job without close supervision.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22	Absence of strict rules and regulations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23	Ability to influence goals and objectives in your work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24	Ability to move from one job to another easily.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
25	Refine your technical skills and abilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
26	Gain excellent long-range employment stability.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
27	Develop and improve your supervisory or managerial skills and abilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
28	Gain a very high income.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
29	Develop and train others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
30	Develop yourself as a person.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
31	Be involved in new and different activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
32	Influence and direct other people's activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 10n

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- 33 Be involved with and around other people. ☐ ☐ ☐ ☐ ☐
- 34 Develop or create something that is new or different. ☐ ☐ ☐ ☐ ☐
- 35 Receive high recognition for your special knowledge. ☐ ☐ ☐ ☐ ☐
- 36 Prove yourself against challenging goals. ☐ ☐ ☐ ☐ ☐
- 37 Use your talents to improve the organization. ☐ ☐ ☐ ☐ ☐
- 38 Exploring to find the type(s) of work you can do best. ☐ ☐ ☐ ☐ ☐

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FIG. 10o

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Now we would like to find out how **IMPORTANT** each of these characteristics is to you by asking you the extent to which you care about alternatives for each characteristic.

If two jobs were acceptable in all other ways, how important would the following **DIFFERENCES** be? Please click an option button after each choice.

Broadening of responsibilities

Major new added functional responsibilities & challenges

versus

Unchanged functional responsibilities & challenges

Not Important
At All

Somewhat
Important

Very
Important

Extremely
Important



Wealth creation

Stock options w/ expected value of \$500,000 in 3 years

versus

No stock options

Not Important
At All

Somewhat
Important

Very
Important

Extremely
Important



Salary

Increase annual comp by +30%

versus

Reduce annual comp by -10%

Not Important
At All

Somewhat
Important

Very
Important

Extremely
Important



Company/Industry

More desirable company or industry than current

versus

FIG. 10p

More & Less

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Less desirable company or industry than current

Not Important At All	Somewhat Important	Very Important	Extremely Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Geographic location

No relocation

versus

Relocate to less desirable location than current

Not Important At All	Somewhat Important	Very Important	Extremely Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Life/work balance

Avg. 40hr work week

versus

Avg. 70hr work week

Not Important At All	Somewhat Important	Very Important	Extremely Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Participate in a major event

Significant experience in/exposure to major event: IPO,
turnaround, etc

versus

No experience in/exposure to major event: IPO, turnaround,
etc

Not Important At All	Somewhat Important	Very Important	Extremely Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Exciting/Interesting job

Much more exciting/interesting job

versus

Job with same level of excitement/interest as current

Not Important	Somewhat	Very	Extremely
---------------	----------	------	-----------

FIG. 10q

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At All C	Important C	Important C	Important C
-------------	----------------	----------------	----------------

Career opportunities/learning

Significantly better career opportunities/learning potential

versus

Same career opportunities/learning potential

Not Important At All C	Somewhat Important C	Very Important C	Extremely Important C
------------------------------	----------------------------	------------------------	-----------------------------

Fit with organizational culture

Significantly better fit with organizational culture

versus

Worse fit with organizational culture

Not Important At All C	Somewhat Important C	Very Important C	Extremely Important C
------------------------------	----------------------------	------------------------	-----------------------------

Ability to impact results

Significantly better ability to impact results and feel valued

versus

Same ability to impact results and feel valued

Not Important At All C	Somewhat Important C	Very Important C	Extremely Important C
------------------------------	----------------------------	------------------------	-----------------------------



FIG. 10r

for info on this

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Based on your responses, we have put together some different jobs for you to consider. In each question, we present two jobs, each described by combinations of characteristics. One is shown on the left of the screen, and the other on the right.

Please decide which job you would prefer and indicate your strength of preference with the option buttons below the choice. For example, if you strongly prefer the job on the left, click an option on the far left side of the scale. If you strongly prefer the one on the right, click an option on the far right side of the scale. Choose middle options as appropriate to indicate your preference.

<p>Reduce annual comp by - 10%</p> <p>Slightly expanded responsibilities & challenges</p>	OR	<p>Increase annual comp by +25%</p> <p>Unchanged functional responsibilities & challenges</p>
<p>Strongly Prefer Left</p> <p>◡ ◡ ◡ ◡ ◡</p>		<p>Somewhat Prefer Left</p> <p>◡ ◡ ◡ ◡ ◡</p>
		<p>No Preference</p> <p>◡ ◡ ◡ ◡ ◡</p>
		<p>Somewhat Prefer Right</p> <p>◡ ◡ ◡ ◡ ◡</p>
		<p>Strongly Prefer Right</p> <p>◡ ◡ ◡ ◡ ◡</p>

<p>Increase annual comp by +25%</p> <p>Less desirable company or industry than current</p>	OR	<p>Annual comp: Same as current</p> <p>Same type of company and industry as current</p>
<p>Strongly Prefer Left</p> <p>◡ ◡ ◡ ◡ ◡</p>		<p>Somewhat Prefer Left</p> <p>◡ ◡ ◡ ◡ ◡</p>
		<p>No Preference</p> <p>◡ ◡ ◡ ◡ ◡</p>
		<p>Somewhat Prefer Right</p> <p>◡ ◡ ◡ ◡ ◡</p>
		<p>Strongly Prefer Right</p> <p>◡ ◡ ◡ ◡ ◡</p>

<p>Significantly better ability to impact results and feel valued</p> <p>Same type of company and industry as current</p>	OR	<p>Somewhat better ability to impact results and feel valued</p> <p>More desirable company or industry than current</p>
<p>Strongly Prefer Left</p> <p>◡ ◡ ◡ ◡ ◡</p>		<p>Somewhat Prefer Left</p> <p>◡ ◡ ◡ ◡ ◡</p>
		<p>No Preference</p> <p>◡ ◡ ◡ ◡ ◡</p>
		<p>Somewhat Prefer Right</p> <p>◡ ◡ ◡ ◡ ◡</p>
		<p>Strongly Prefer Right</p> <p>◡ ◡ ◡ ◡ ◡</p>

FIG. 10s

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<input checked="" type="checkbox"/>	Same ability to impact results and feel valued	Somewhat better ability to impact results and feel valued
	Significant experience in/exposure to major event: IPO, turnaround, etc	OR No experience in/exposure to major event: IPO, turnaround, etc
	Strongly Prefer Left	Somewhat Prefer Left
	No Preference	Somewhat Prefer Right
	Strongly Prefer Right	
	No stock options	Stock options w/ expected value of \$500,000 in 3 years
	Some experience in/exposure to major event: IPO, turnaround, etc	OR No experience in/exposure to major event: IPO, turnaround, etc
	Strongly Prefer Left	Somewhat Prefer Left
	No Preference	Somewhat Prefer Right
	Strongly Prefer Right	
	Much more exciting/interesting job	Somewhat more exciting/interesting job
	No stock options	OR Stock options w/ expected value of \$250,000 in 3 years
	Strongly Prefer Left	Somewhat Prefer Left
	No Preference	Somewhat Prefer Right
	Strongly Prefer Right	

FIG. 10t

Kocher & Co.

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<input checked="" type="checkbox"/>	Same degree of fit with organizational culture	OR	Somewhat better fit with organizational culture
	Much more exciting/interesting job		Job with same level of excitement/interest as current
	Strongly Prefer Left	Somewhat Prefer Left	No Preference
	Somewhat Prefer Right		Strongly Prefer Right
	Worse fit with organizational culture	OR	Significantly better fit with organizational culture
	Major new added functional responsibilities & challenges		Slightly expanded responsibilities & challenges
	Strongly Prefer Left	Somewhat Prefer Left	No Preference
	Somewhat Prefer Right		Strongly Prefer Right
	Significant experience in/exposure to major event: IPO, turnaround, etc	OR	Some experience in/exposure to major event: IPO, turnaround, etc
	Unchanged functional responsibilities & challenges		Major new added functional responsibilities & challenges
	Strongly Prefer Left	Somewhat Prefer Left	No Preference
	Somewhat Prefer Right		Strongly Prefer Right

FIG. 10u

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<input type="checkbox"/>		Stock options w/ expected value of \$250,000 in 3 years	Stock options w/ expected value of \$100,000 in 3 years
Increase annual comp by +10%		OR	Annual comp: Same as current
Strongly Prefer Left	Somewhat Prefer Left	No Preference	Somewhat Prefer Right
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Significantly better fit with organizational culture		Same degree of fit with organizational culture	
More desirable company or industry than current		OR	Somewhat more desirable company or industry than current
Stock options w/ expected value of \$100,000 in 3 years		Stock options w/ expected value of \$500,000 in 3 years	
Strongly Prefer Left	Somewhat Prefer Left	No Preference	Somewhat Prefer Right
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Job with same level of excitement/interest as current		Somewhat more exciting/interesting job	
Reduce annual comp by - 10%		OR	Increase annual comp by +30%
Significantly better ability to impact results and feel valued		Same ability to impact results and feel valued	
Strongly Prefer Left	Somewhat Prefer Left	No Preference	Somewhat Prefer Right
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FIG. 10v

10-20-99

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<input checked="" type="checkbox"/>		Somewhat more exciting/interesting job		Job with same level of excitement/interest as current	
Major new added functional responsibilities & challenges		OR		Significantly expanded responsibilities & challenges	
Less desirable company or industry than current		OR		More desirable company or industry than current	
Strongly Prefer Left	Somewhat Prefer Left	No Preference	Somewhat Prefer Right	Strongly Prefer Right	
Somewhat better fit with organizational culture		OR		Worse fit with organizational culture	
Significant experience in/exposure to major event: IPO, turnaround, etc		OR		No experience in/exposure to major event: IPO, turnaround, etc	
Reduce annual comp by - 10%		OR		Annual comp: Same as current	
Strongly Prefer Left	Somewhat Prefer Left	No Preference	Somewhat Prefer Right	Strongly Prefer Right	
Slightly expanded responsibilities & challenges		OR		Significantly expanded responsibilities & challenges	
Stock options w/ expected value of \$250,000 in 3 years		OR		Stock options w/ expected value of \$500,000 in 3 years	
Significantly better ability to impact results and feel valued		OR		Same ability to impact results and feel valued	
Strongly Prefer Left	Somewhat Prefer Left	No Preference	Somewhat Prefer Right	Strongly Prefer Right	

FIG. 10w

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This is the last section. Based on all your responses, we have created some jobs for you to consider. You should like the first job least, the second one best, and any others should fall in between.

Please indicate how likely you would be to accept each job if it were available right now.

Unchanged functional responsibilities & challenges
 Increase annual comp by +30%
 Less desirable company or industry than current
 Same ability to impact results and feel valued
 No experience in/exposure to major event: IPO, turnaround, etc
 Stock options w/ expected value of \$500,000 in 3 years
 Job with same level of excitement/interest as current
 Worse fit with organizational culture
 Enter a number from 0 to 100

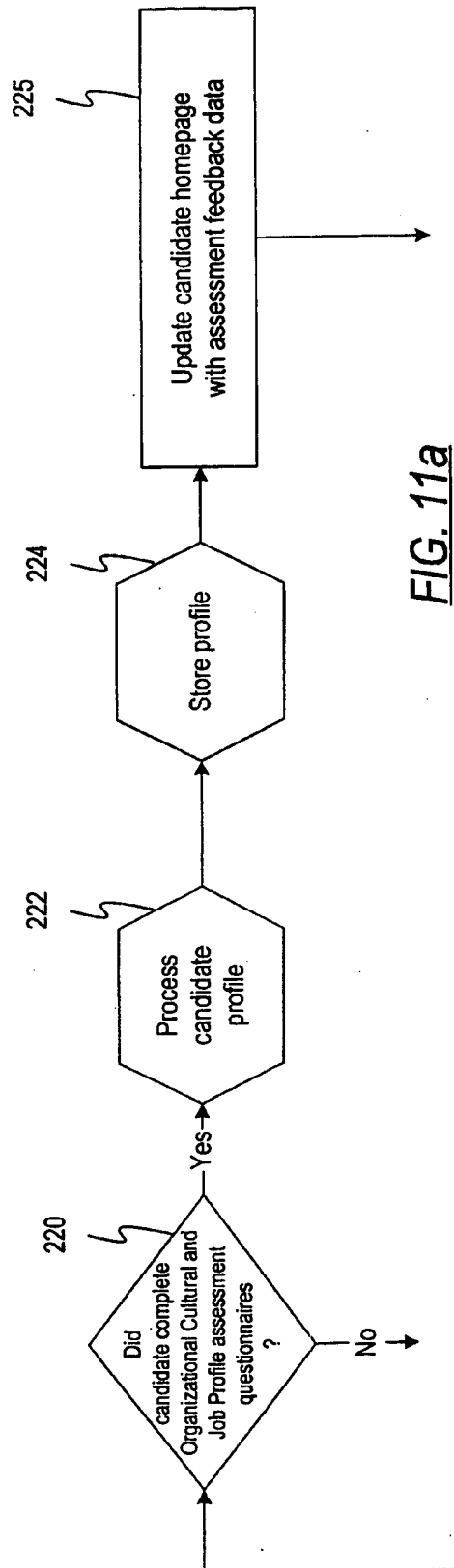
Major new added functional responsibilities & challenges
 Reduce annual comp by -10%
 More desirable company or industry than current
 Significantly better ability to impact results and feel valued
 Significant experience in/exposure to major event: IPO, turnaround, etc
 No stock options
 Much more exciting/interesting job
 Significantly better fit with organizational culture
 Enter a number from 0 to 100

Major new added functional responsibilities & challenges
 Increase annual comp by +30%
 More desirable company or industry than current
 Significantly better ability to impact results and feel valued
 No experience in/exposure to major event: IPO, turnaround, etc
 Stock options w/ expected value of \$500,000 in 3 years
 Job with same level of excitement/interest as current
 Significantly better fit with organizational culture
 Enter a number from 0 to 100

Unchanged functional responsibilities & challenges
 Reduce annual comp by -10%
 Less desirable company or industry than current
 Same ability to impact results and feel valued
 Significant experience in/exposure to major event: IPO, turnaround, etc
 No stock options
 Much more exciting/interesting job
 Worse fit with organizational culture
 Enter a number from 0 to 100


 FIG. 10x

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FIG. 11a

Brock & Clarke

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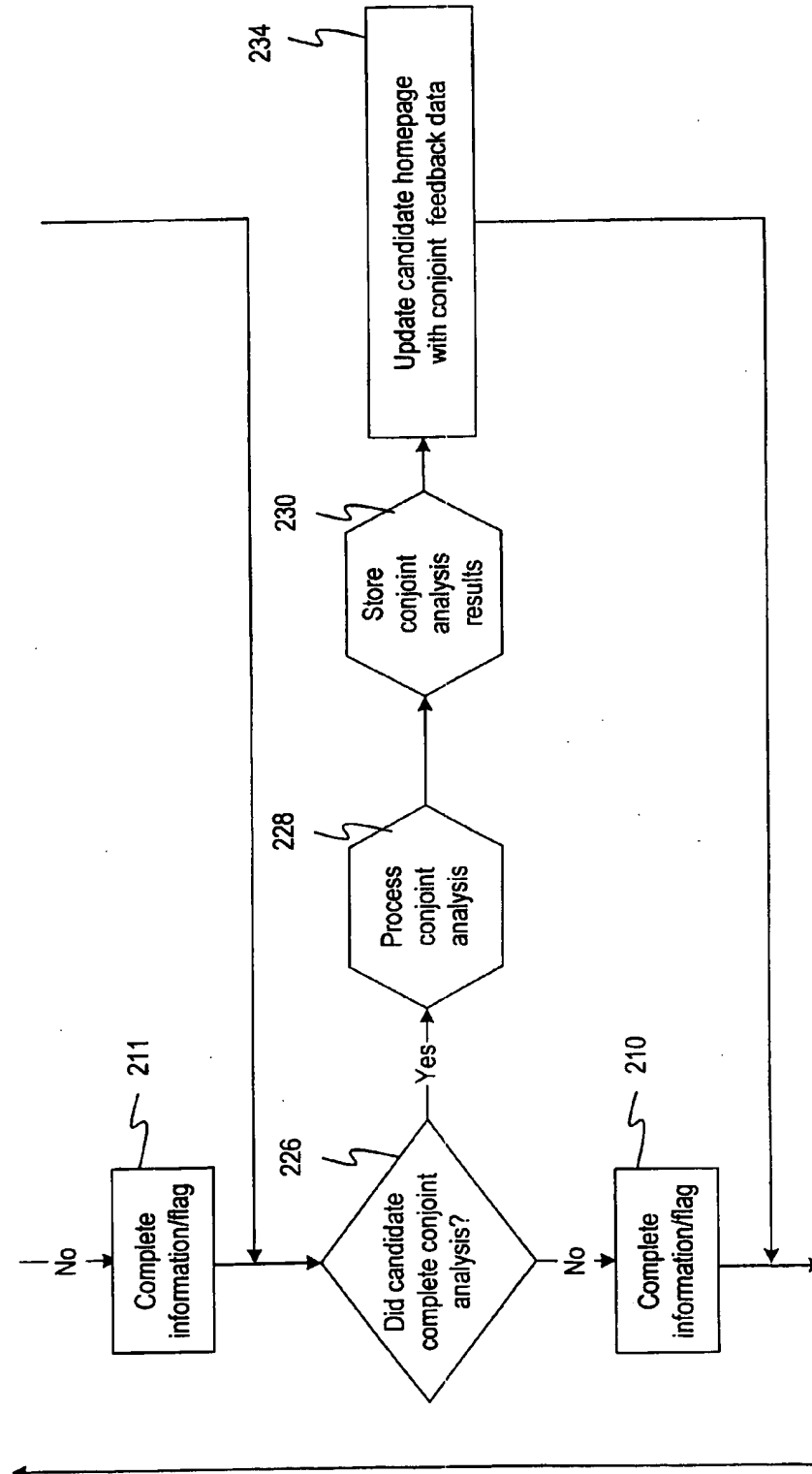


FIG. 11b

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HIGHLY CONFIDENTIAL**Job - Person Match Analysis:**Client:
Position:Engagement:
Date:Overall Style Fit: 68.2%
Role Style Fit: 70.5%
Operating Style Fit: 65.9%

Operating Styles		Job Profile	Candidate Profile	Comments
Primary	Style used most often when involved in on-the-job performance and decision-making.	Decisive	Decisive	Primary style matches job requirement exactly
Secondary	Style used second most often in day-to-day, on-the-job task performance and decision-making.	Integrative Hierarchic		Mismatch
Decisive	Fast and focused style, emphasizing short-term results and efficiency.	M	MH	Decisive operating style slightly too high - occasionally might decide without considering enough information or alternatives.
Flexible	Fast and adaptable style, emphasizing responsiveness and getting along.	M	L	Flexible operating style too low - might not adapt quickly enough to changing circumstances.
Hierarchic	Analytic and logical style, emphasizing thoroughness, long-range planning and quality.	M	ML	Hierarchic operating style slightly too low - occasionally might overlook details and logic favoring specific solutions.
Integrative	Exploratory and analytic style, emphasizing integration of diverse information and points of view, and new ways of doing things.	M	L	Integrative operating style too low - might fail to consider a sufficient breadth of information and alternatives.
Role Styles				
Primary	Style used most frequently in formal interactions with others.	Hierarchic	Flexible	Primary role style misses primary but matches secondary style needed.
Secondary	Style used second most frequently in formal interactions with others.	Flexible	Integrative	Mismatch
Decisive	Matter-of-fact, direct style of interaction with emphasis on practicality and rules.	ML	L	Decisive role style slightly too low - occasionally might not be quite clear enough or direction enough with others as job requires.
Flexible	Easy-going, relaxed, and casual style of interaction.	M	H	Flexible role style too high - might be too informal and casual in dealing with others; might not seem serious enough.
Hierarchic	Data-oriented, logical and analytic style of interaction	M	M	Hierarchic role style fits job requirement exactly.
Integrative	Interactive, exploratory, and information-seeking style of interaction	M	MH	Integrative role style slightly too high - might occasionally be seen as a bit lacking in practicality & focus.

FIG. 12a

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Leadership Styles

Traditional	Emphasis on formal authority, policies and procedures, and task requirements.	H	H	May not use collegial methods sufficiently.
Collegial	Emphasis on persuasion, motivation, and team consensus	MH	M	

FIG. 12b*Handwritten signature*

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HIGHLY CONFIDENTIAL

Culture - Person Match Analysis:

Client:
Position:

Engagement:
Date:

Overall Match: 82.0%

	Job Profile	Candidate Profile	Comments
Primary Motive	Expert	Expert	Primary motives match culture exactly
Secondary Motive	Transitory	Linear	Mismatch
Expert Motive	MH	H	Might feel that the culture is a bit lacking in opportunities and rewards for development of highly specialized skills and knowledge
Linear Motive	MH	MH	
Spiral Motive	M	M	Might occasionally feel pressure to change jobs or functions too often, or to get involved frequently in a variety of very short projects.
Transitory Motive	MH	M	

Summary:

Might feel that the culture is a bit lacking in opportunities and rewards for development of highly specialized skills and knowledge; Might occasionally feel pressure to change jobs or functions too often, or to get involved frequently in a variety of very short projects.

FIG. 12c

Handwritten signature

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On-The-Job Problem-Solving, Decision-Making and Task Performance

Action-Oriented					Analytic				
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very Action-Oriented					Very Analytic				
Moderately Action-Oriented and Analytic									
Persistent					Flexible				
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very Persistent					Very Flexible				
Moderately Persistent and Flexible									

FIG. 13a

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Interpersonal Styles

Directive					Collaborative					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Very Directive					Moderately Directive and Collaborative					Very Collaborative
					X					

Quick					Comprehensive					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Very Quick					Moderately Quick and Comprehensive					Very Comprehensive
					X					

FIG. 13b

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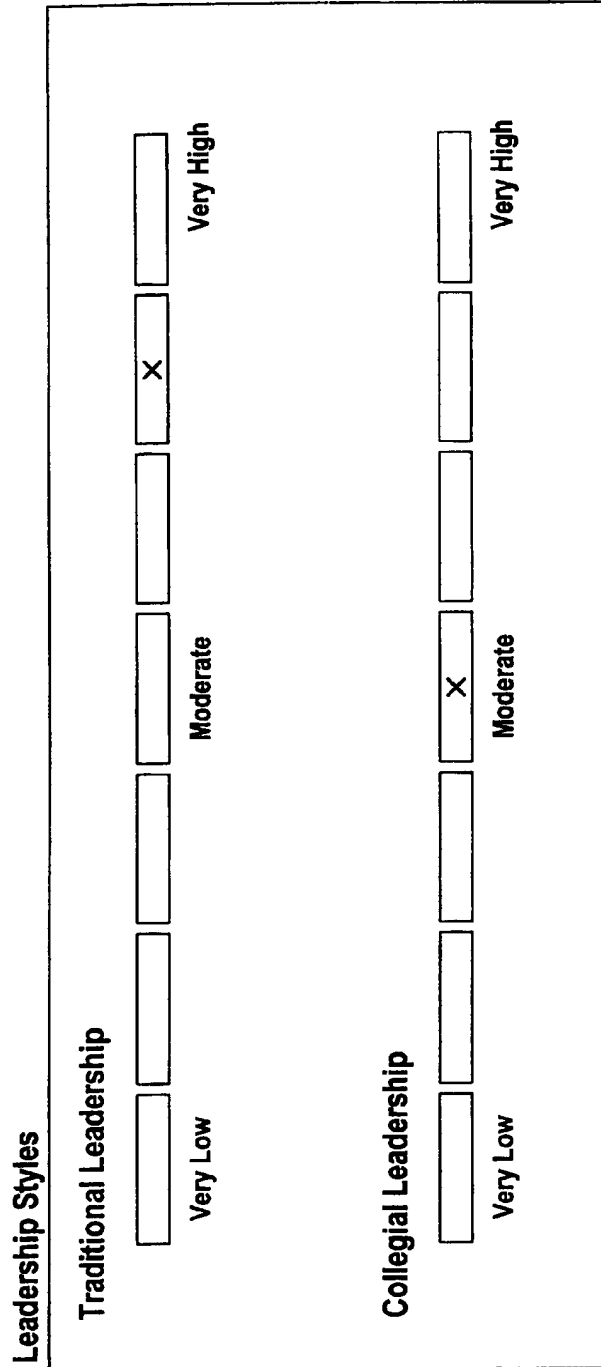


FIG. 13c

Source: Deet

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Career Motives Match

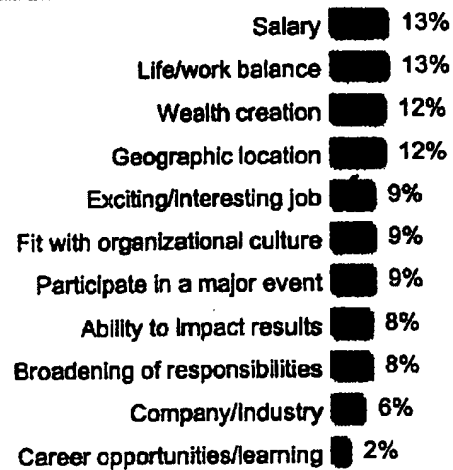
Expertise and Stability									
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low Importance			Moderate Importance				High Importance		
Power and Achievement									
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low Importance			Moderate Importance				High Importance		
Personal Growth and Creativity									
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low Importance			Moderate Importance				High Importance		
Novelty and Independence									
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low Importance			Moderate Importance				High Importance		

FIG. 13d

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**Korn/Ferry Futurestep
Desired Job Characteristics Feedback for**

This chart summarizes what you seek in terms of an ideal job, with the most important characteristics higher in the chart. Additionally, the chart tells you what relative weight you attach to each characteristic. For example, a bar that is twice as long as another bar tells you that you consider the former factor to be twice as important as the latter.

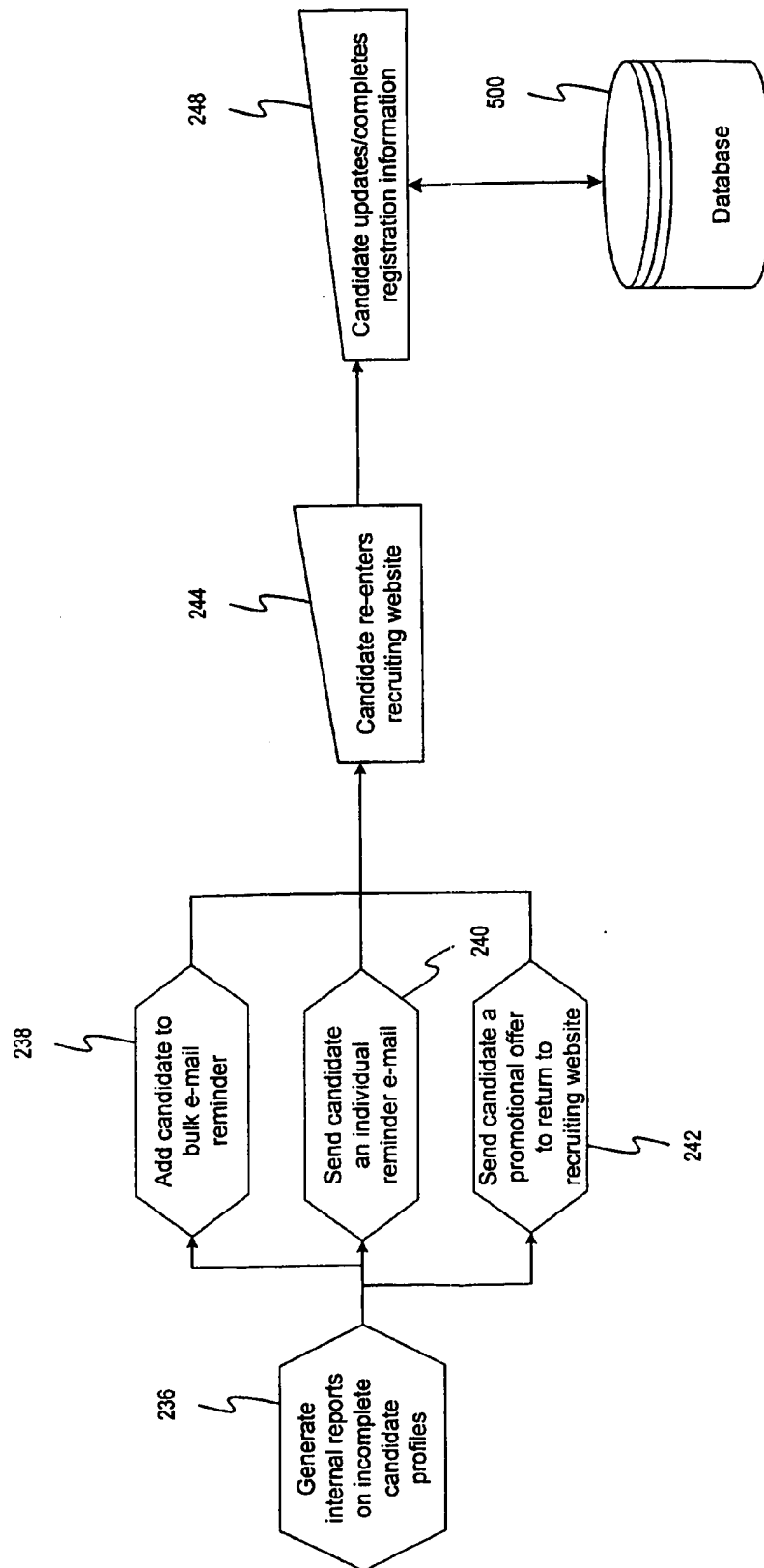


We at Futurestep appreciate the time you have taken to provide us with your information. We look forward to working with you in the future.

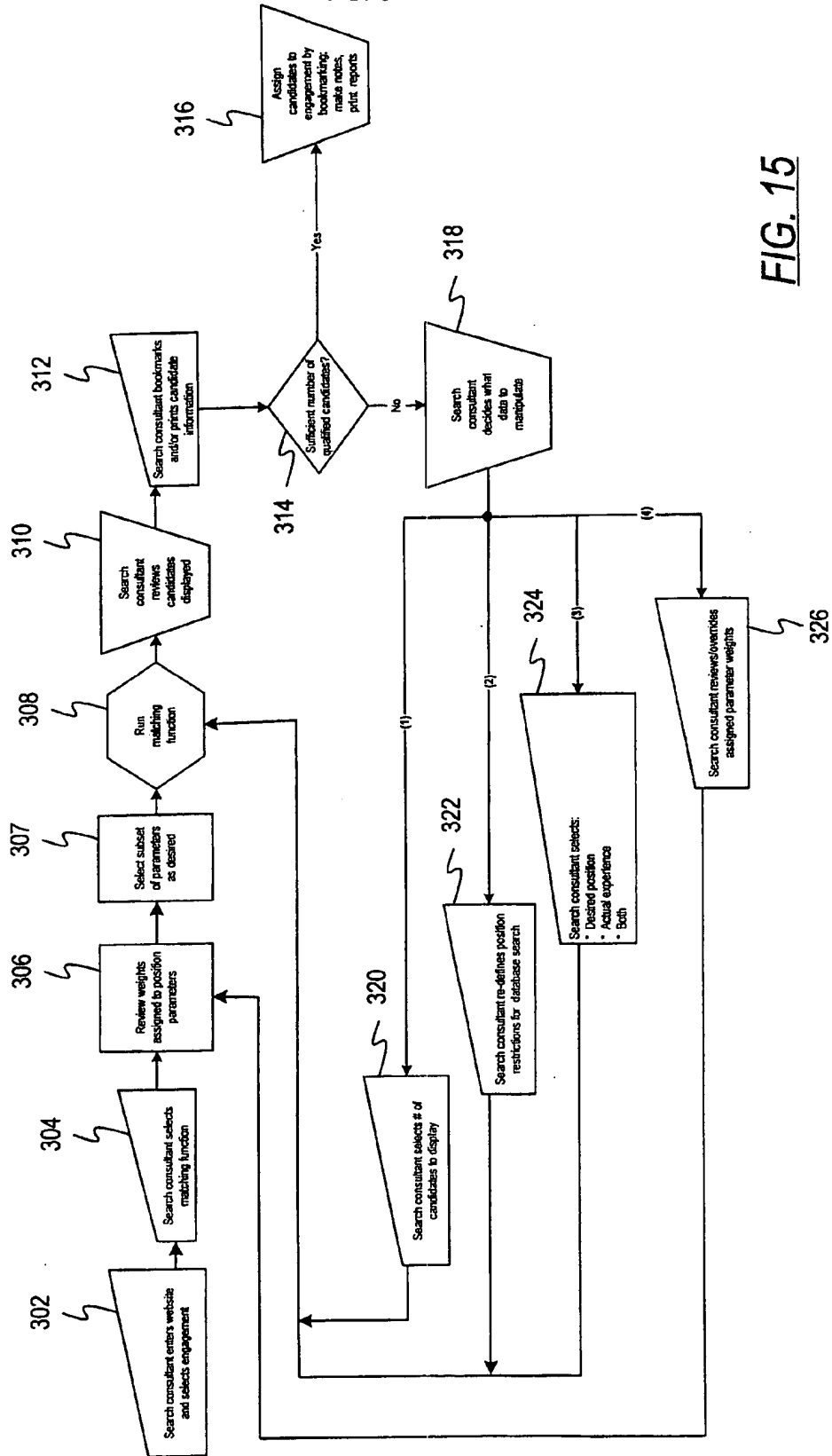
FIG. 13e

Futurestep

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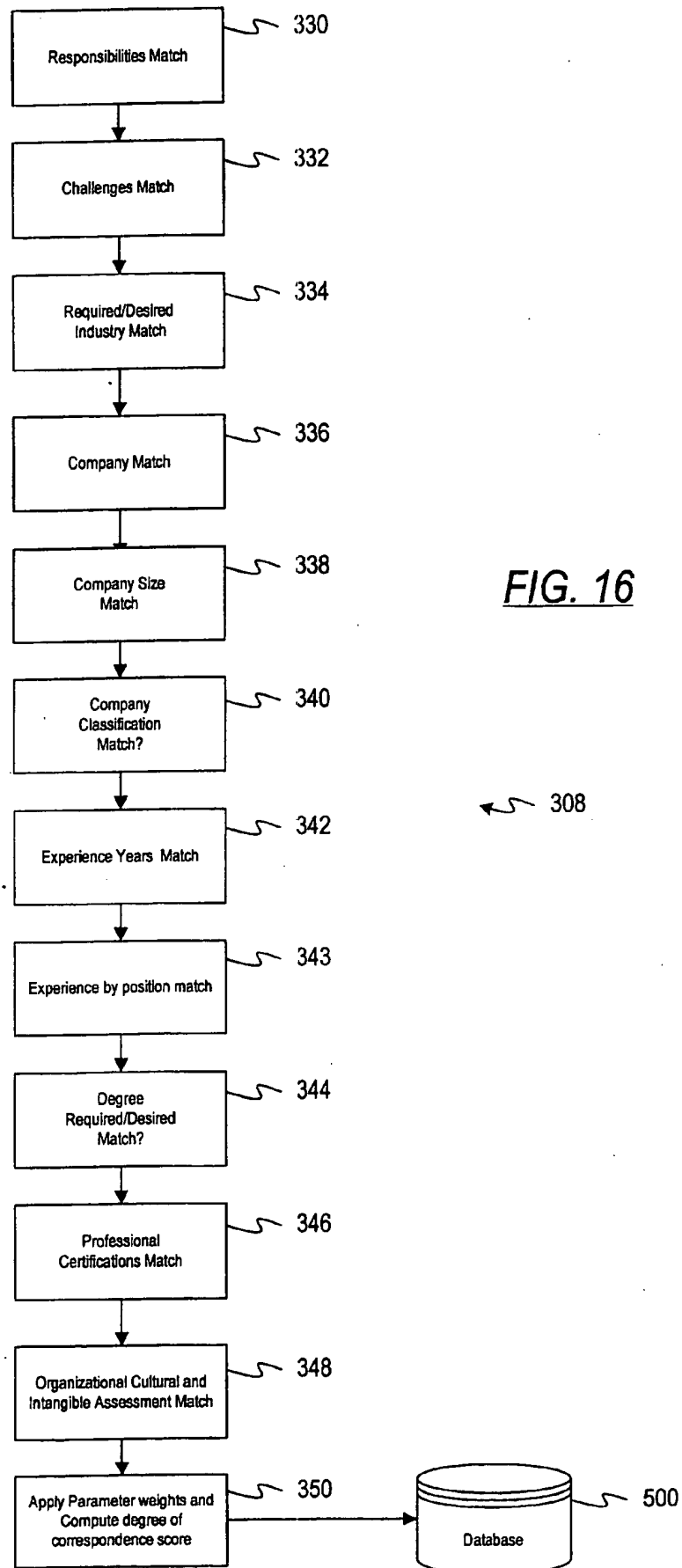
FIG. 14*Michael J. O'Leary*

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Mark A. Black

76/93

*Mark A. Clark*

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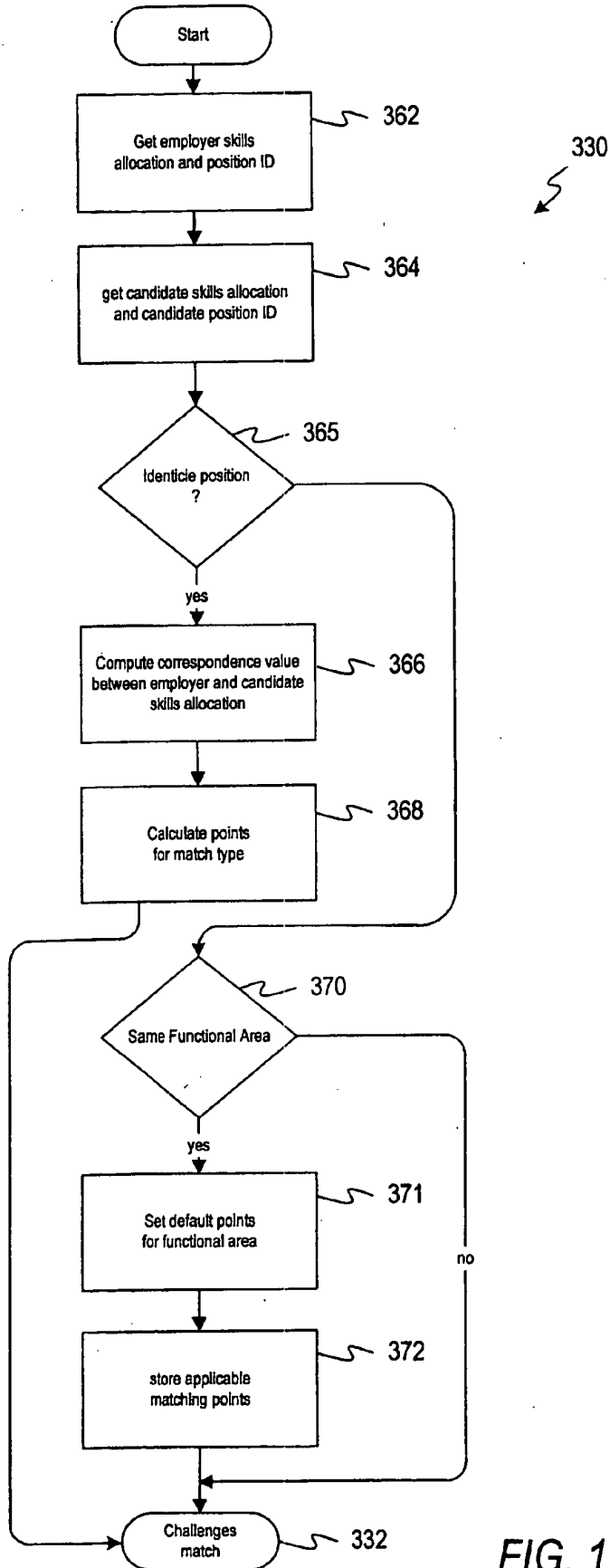
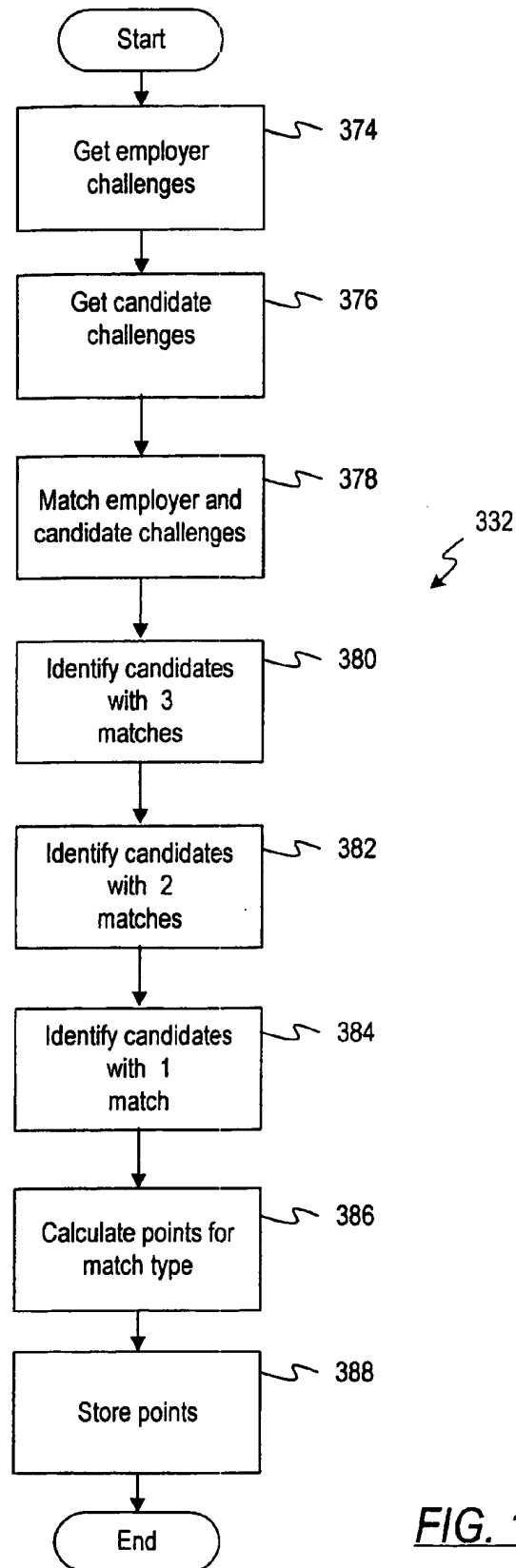


FIG. 17

Inventor: [Signature]

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**FIG. 18***Handwritten signature*

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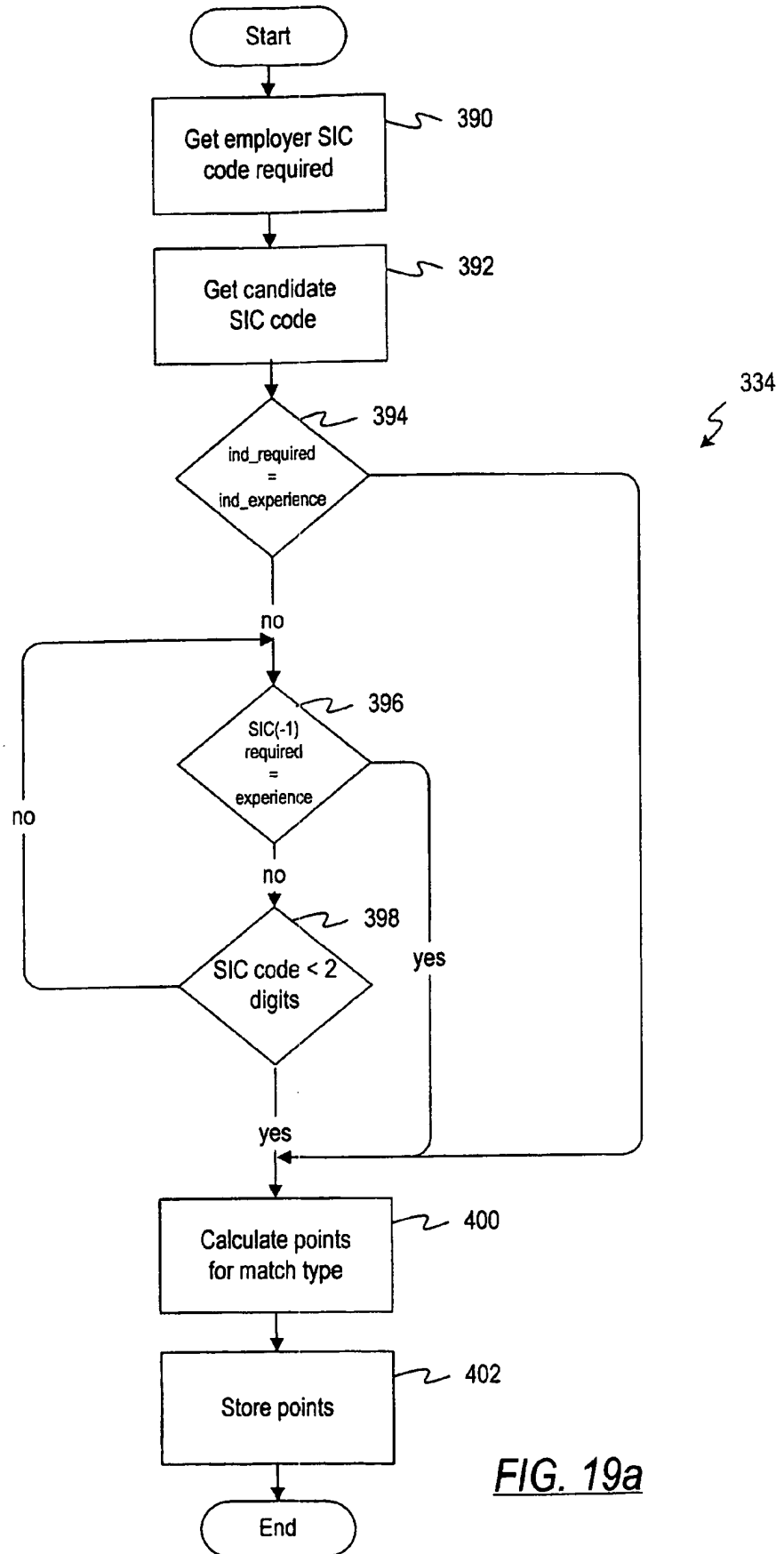


FIG. 19a

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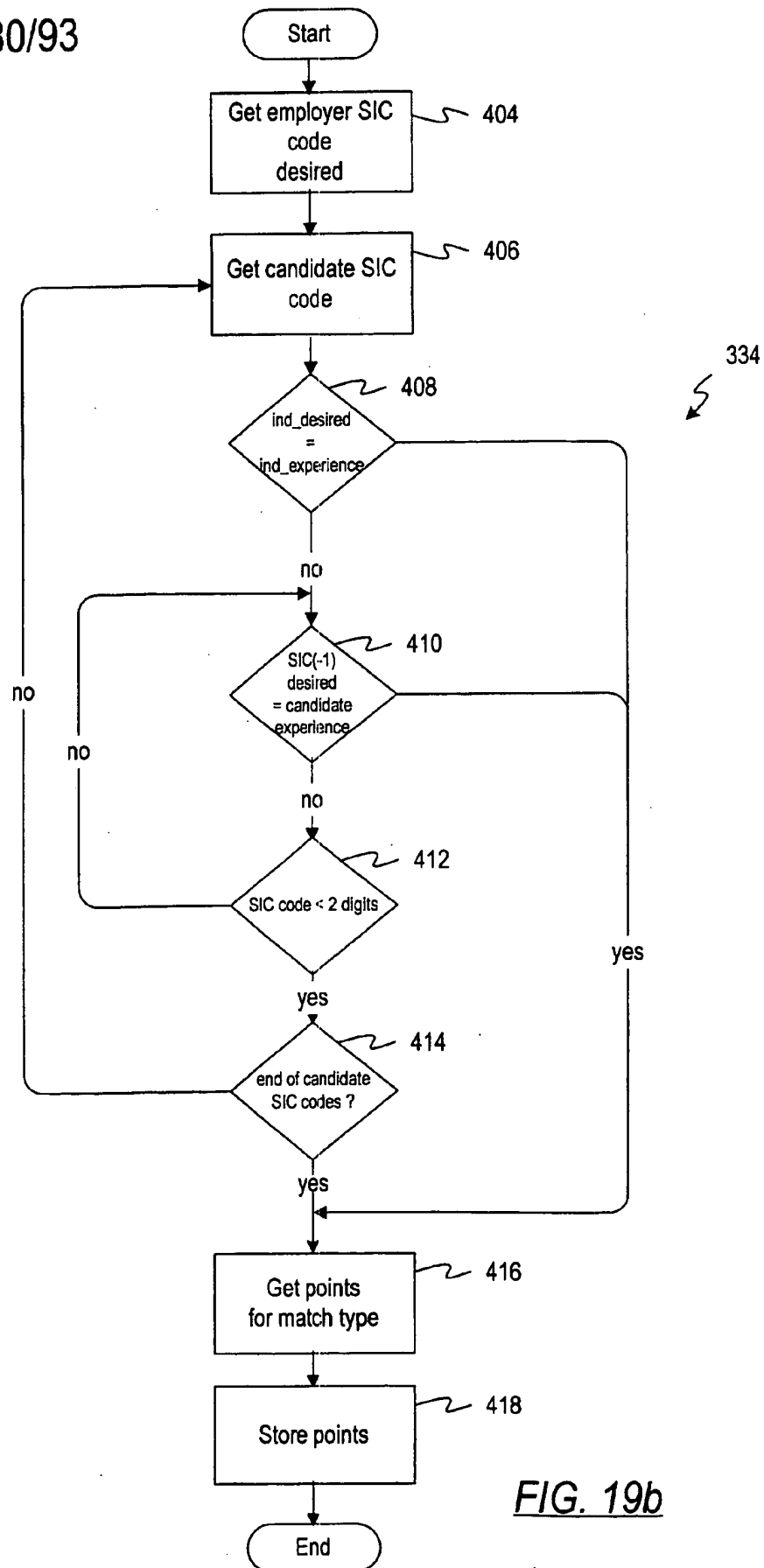


FIG. 19b

Kevin A. O'Leary

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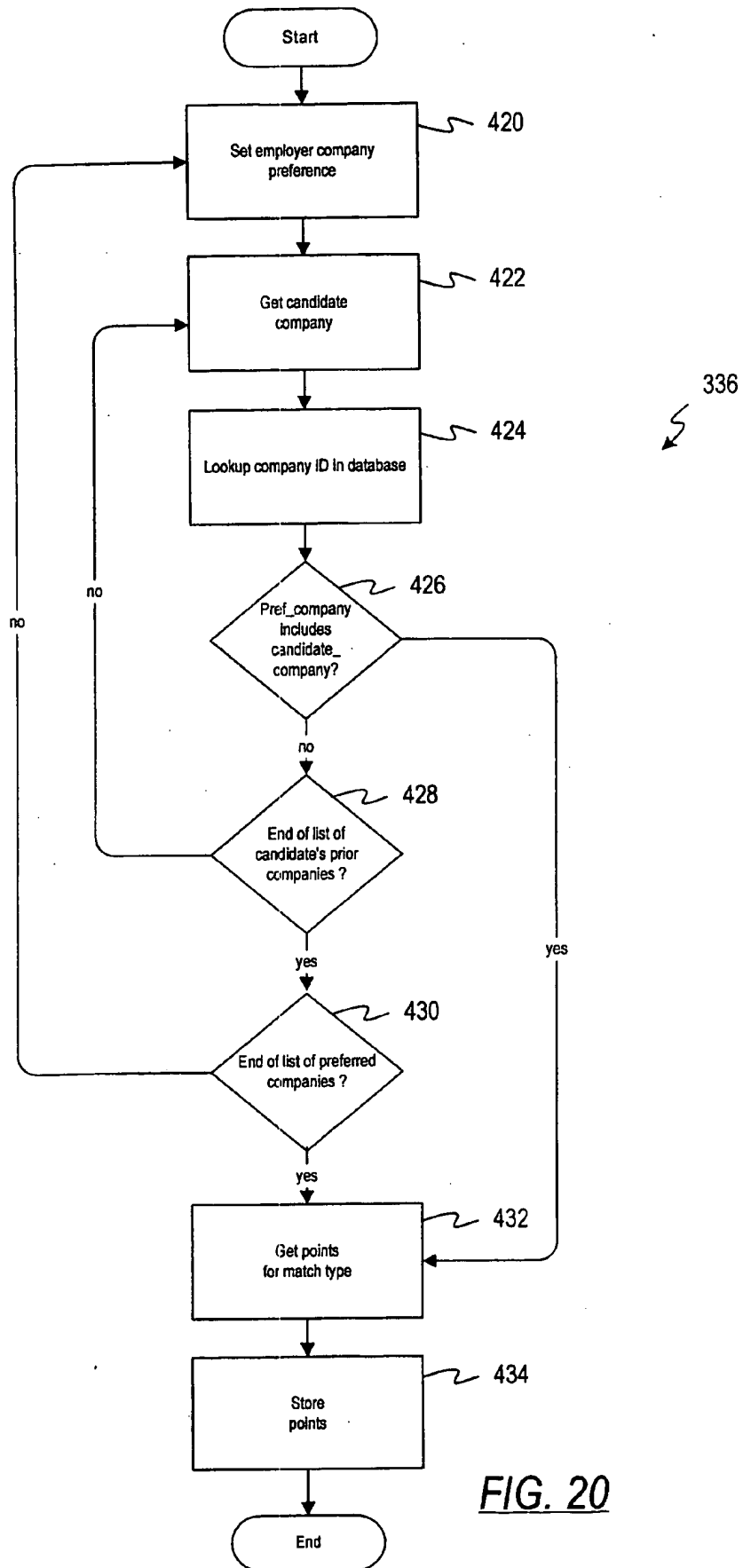


FIG. 20

Inventor's Signature

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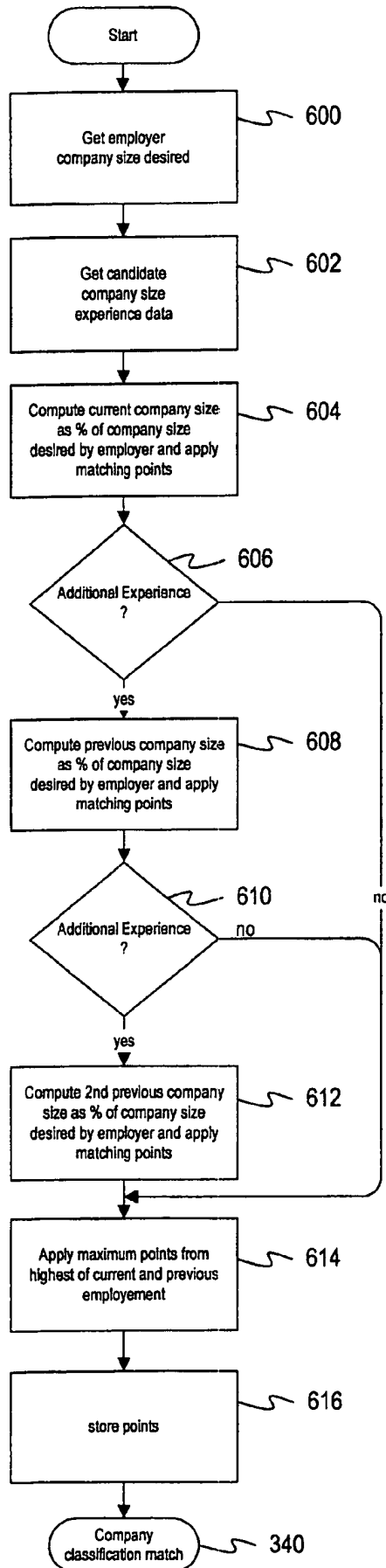
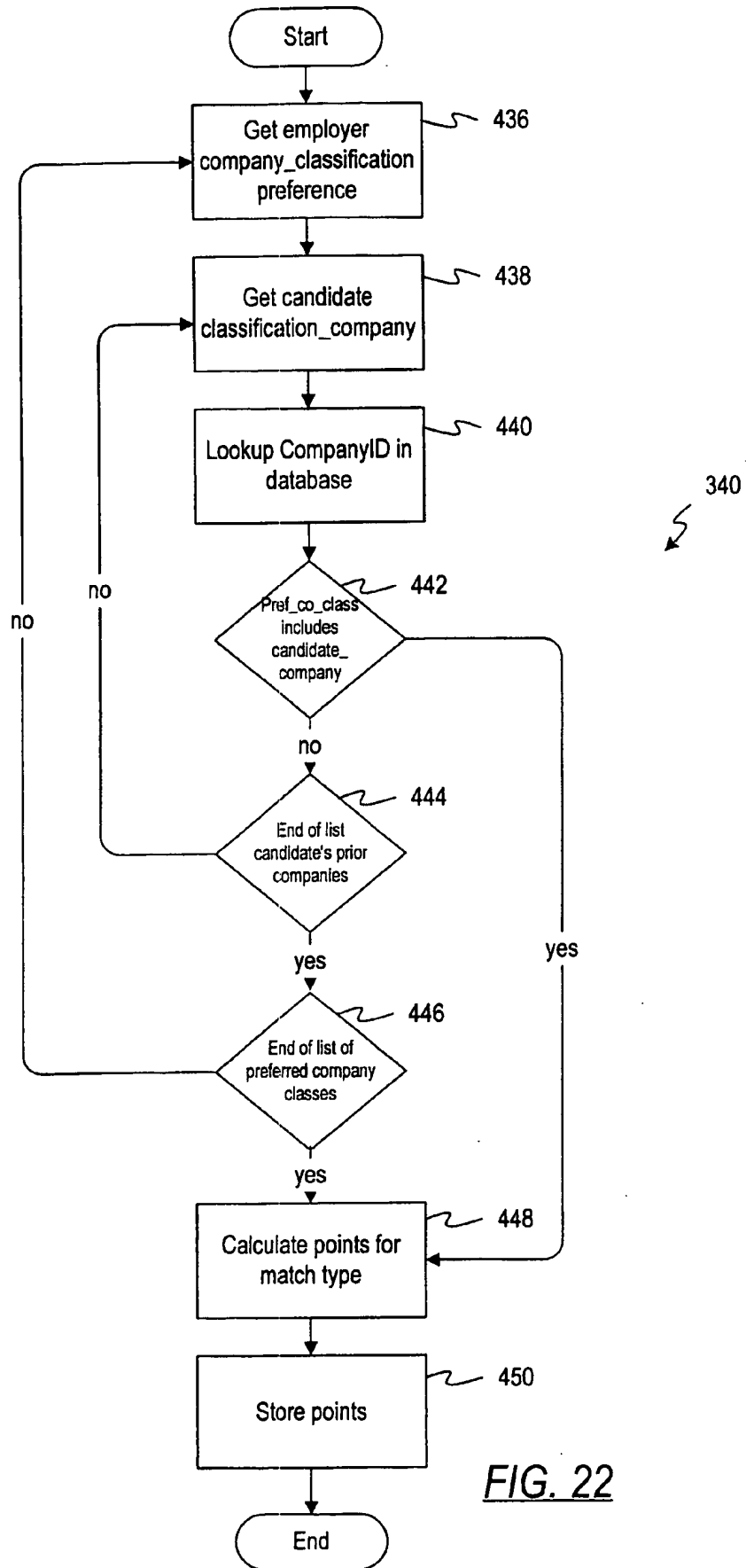


FIG. 21

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**FIG. 22***Inventor's Signature*

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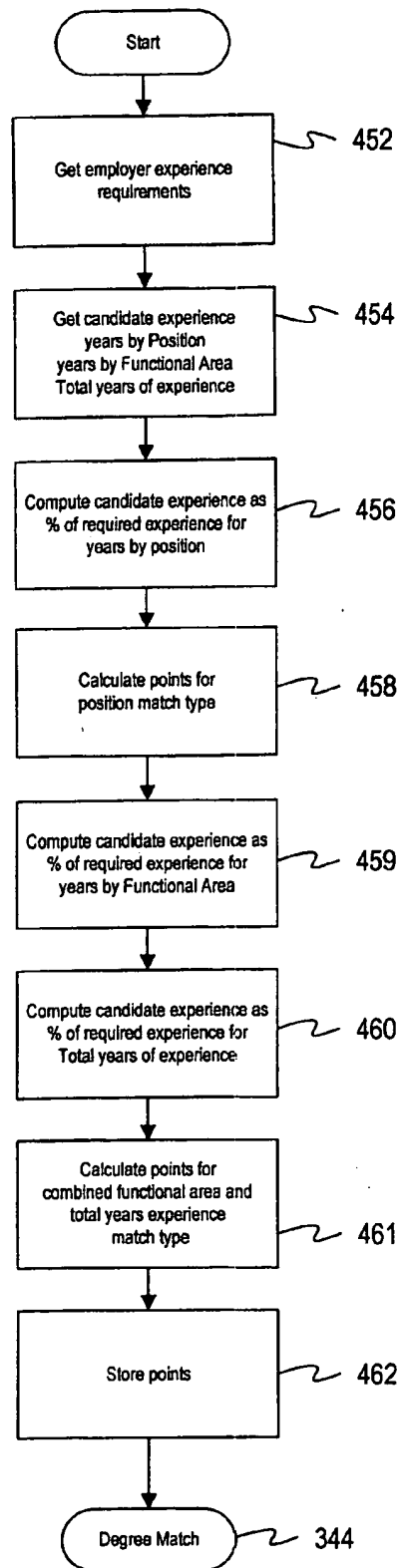
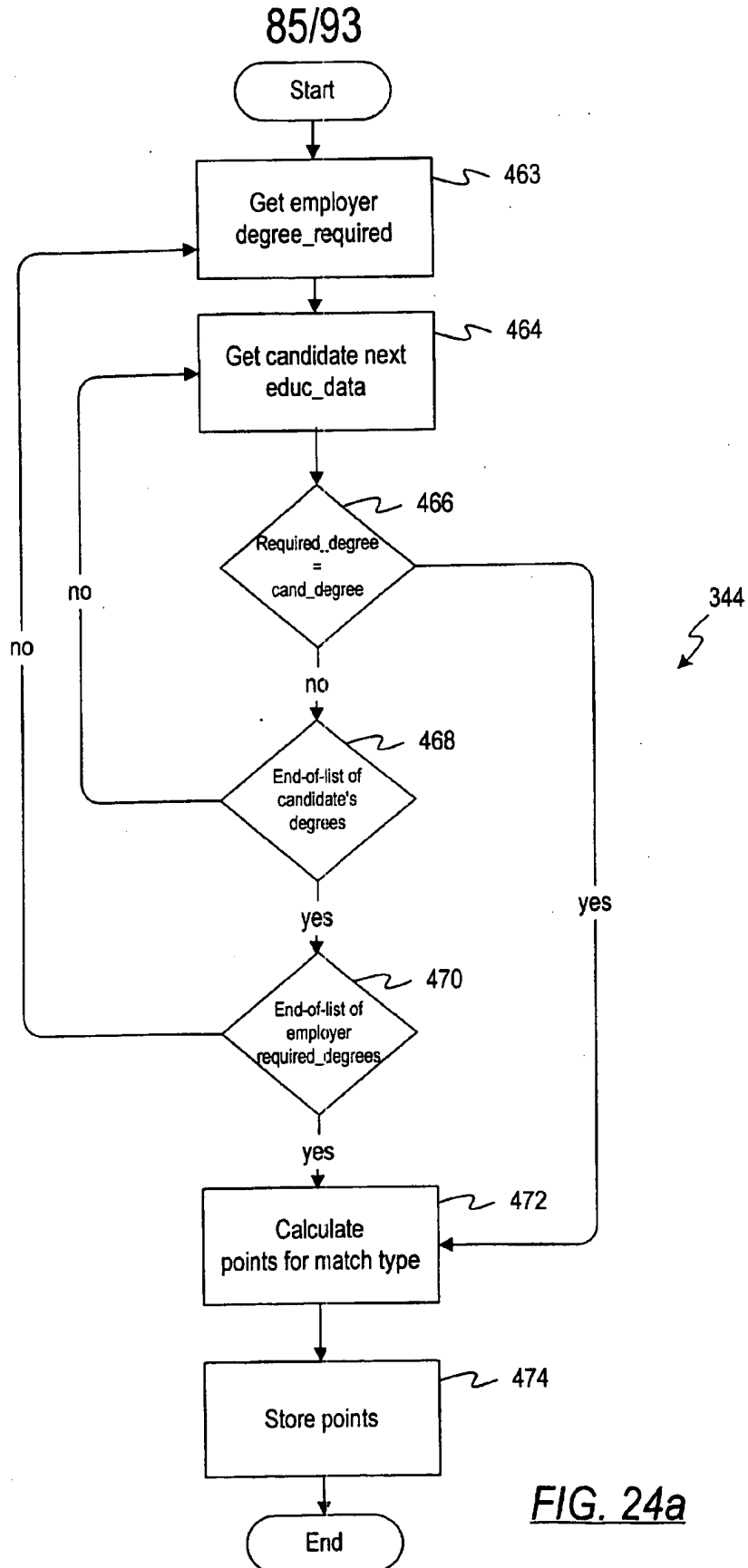


FIG. 23

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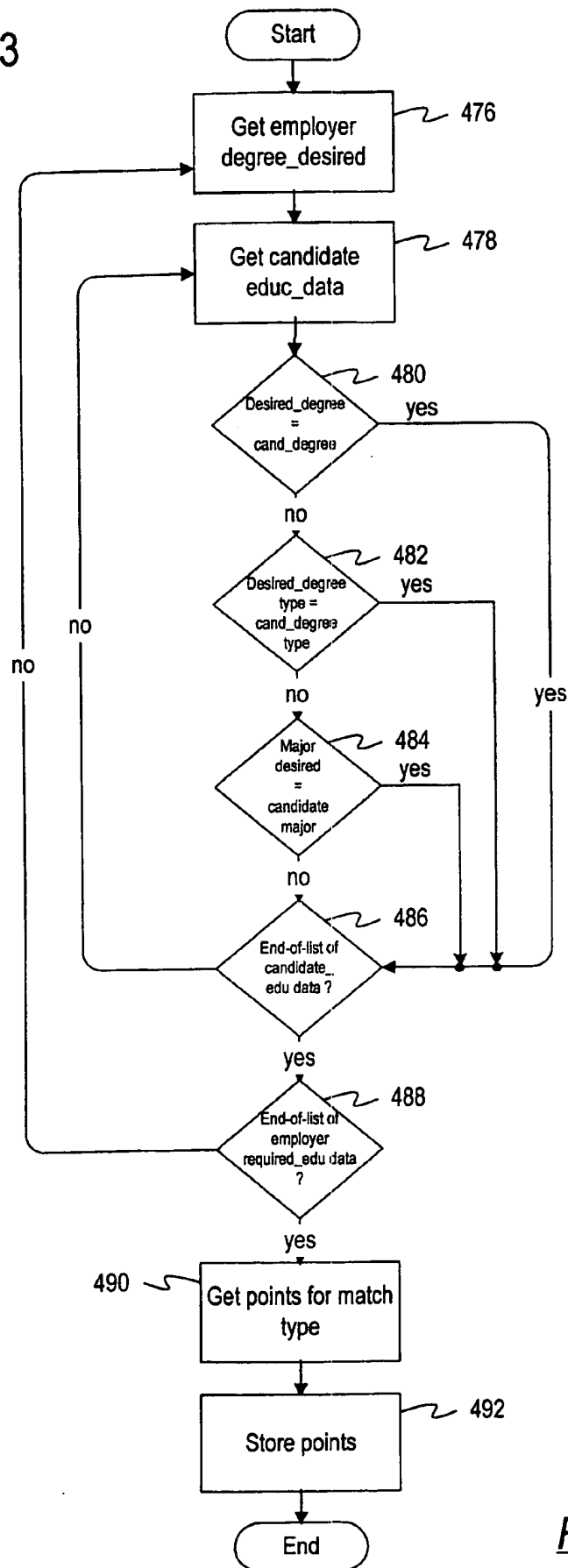


FIG. 24b

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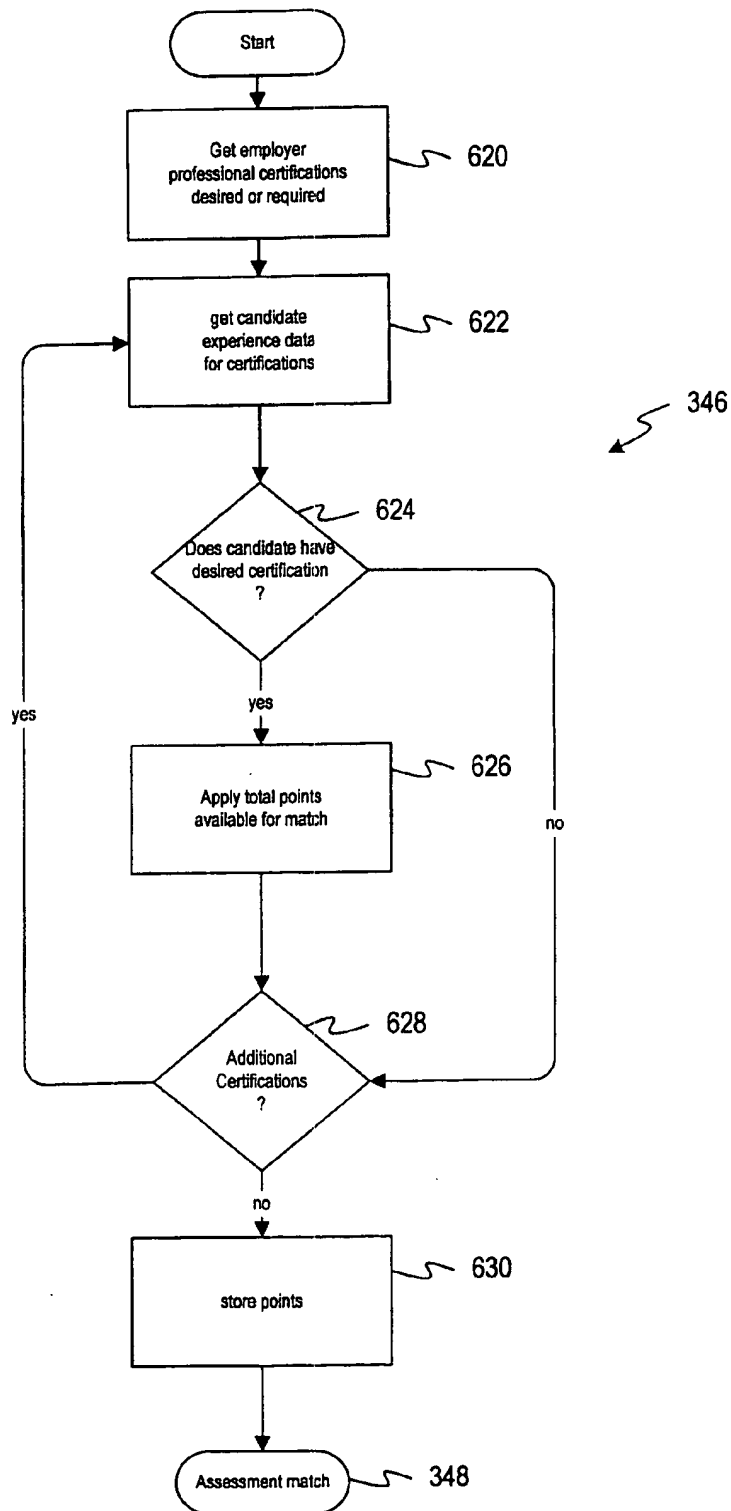


FIG. 25

Book 1 of 2

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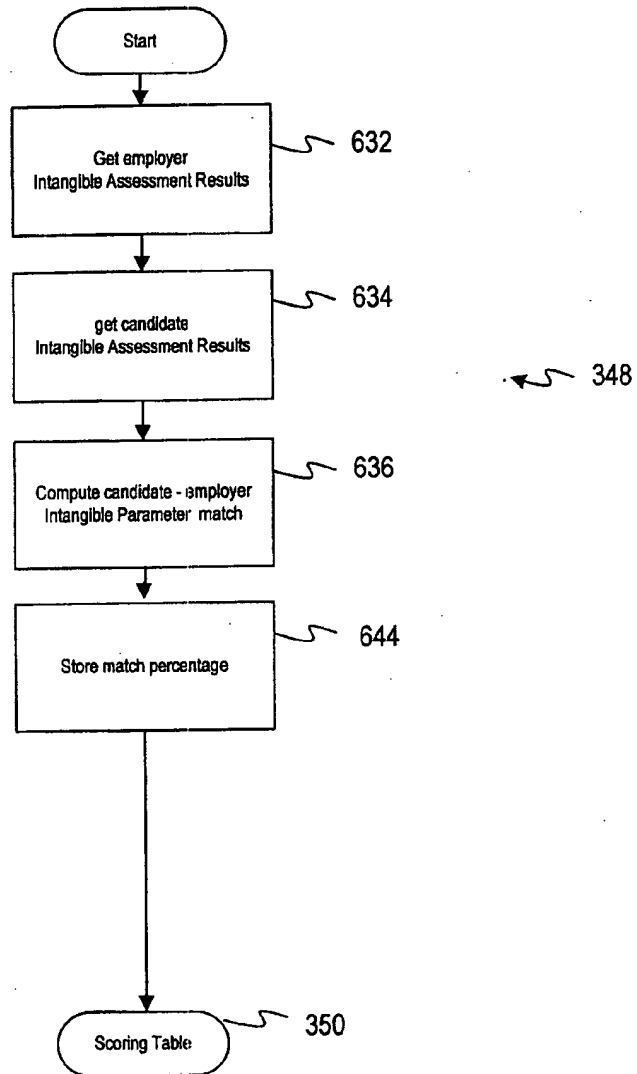
**FIG. 26***Handwritten signature*

FIG. 27a

FIG. 21d

Criteria		Candidate Data						
1. Responsibility (Skill) Match (Block 330)								
Match Criteria	0 to 100 pts	No Fit	Somewhat Related	Related	Closely Related	Bulls-eye	Points	Adjusted Pts
Points	min 40 with no match	>550 40	451-550 55	301-450 70	151-300 85	<150 100	100	10
2. Challenges (Block 332)								
Match Criteria	0 to 100 pts			1 of 3 match	2 of 3 match	3 of 3 match		
Points				60	80	100	100	10
3. Required Industry (Block 334)								
Match Criteria				a 2 digit SIC match	40			
				a 3 digit SIC match	60			
				a 4 digit SIC match	80			
Points	0 to 100 pts			a 5 digit SIC match	100		100	10
3(a). Desired Industry (Block 334)								
Match Criteria				a 2 digit SIC match	20			
				a 3 digit SIC match	40			
				a 4 digit SIC match	60			
Points	0 to 100 pts			a 5 digit SIC match	80		80	8
4. Desired Company (Block 336)								
Points	0 to 100 pts				0	100	100	10
Match Criteria					no match	match		
5. Desired Company Class (Block 340)								
Points	0 to 100 pts				0	100	100	10
Match Criteria					no match	match		

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FIG. 27b

Criteria		Candidate Data				
6. Company Size (Block 338)						
Match Criteria - Sales		1. Under \$50 million				1
		2. \$50-\$100 million				>1
		3. \$101-\$300 million			1	2
		4. \$301-\$600 million			2	3
		5. \$601-\$1200 million			3	4
		6. Over \$1200 million			4	5
Match Criteria - Staff		1. Under 10 people				1
		2. 10 - 20 people				>1
		3. 21 - 40 people			1	2
		4. 41 - 74 people			2	3
		5. 75 - 99 people			3	4
		6. Over 100 people			4	5
Match Criteria - Assets		1. Under \$1 billion				1
		2. \$1 - \$10 billion				>1
		3. \$11 - \$100 billion			1	2
		4. \$101 - \$250 billion			2	3
		5. \$251 - \$500 billion			3	4
		6. Over \$500 billion			4	5
Points	0 to 100 pts	Company Size	0	20	40	60
					80	100
					100	10
7. Experience Years Required (Block 342)						
Match Criteria		<i>linear relationship from 50%</i>				
Points	0 to 100 pts	50%	<	>	100%	100
		0	<	>	100	10
7(a). Exp. Years by Function (Block 342)						
Match Criteria		<i>linear relationship from 0%</i>				
Points	0 to 100 pts	0%	<	>	100%	100
		0	<	>	100	10
8. Exp. Years by Position (Block 343)						
Match Criteria		<i>Current position</i>				
		0%	<	>	100%	100
		0%	<	>	100%	100
		0%	<	>	100%	100
		0%	<	>	100%	100
Points	0 to 100 pts	0	40	60	80	100
					100	10

FIG. 27C

FIG. 2/C

Criteria		Candidate Data			
9. Degree Required (Block 344)					
Match Criteria	match is \geq degree	no match	match		
Points	0 to 100 pts	0	100	100	10
9(a). Degree Desired (Block 344)					
Match Criteria	if 8 is no match; check 8a	no match	match		
Points	0 to 100 pts	0	80	80	8
10. Prof. Certification Required (Block 346)					
Match Criteria		no match	match		
Points	0 to 100 pts	0	100	100	10
10(a). Prof. Certification Desired (Block 346)					
Match Criteria		no match	match		
Points	0 to 100 pts	0	100	100	10
		sum of points		x	y
				x/y = z	
11. Assessment (Block 348)					
				a%	
				b%	
				c%	
				d% = (a+b+c)/3	
				Final score	((d*100) + z)/2

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Books & Clock

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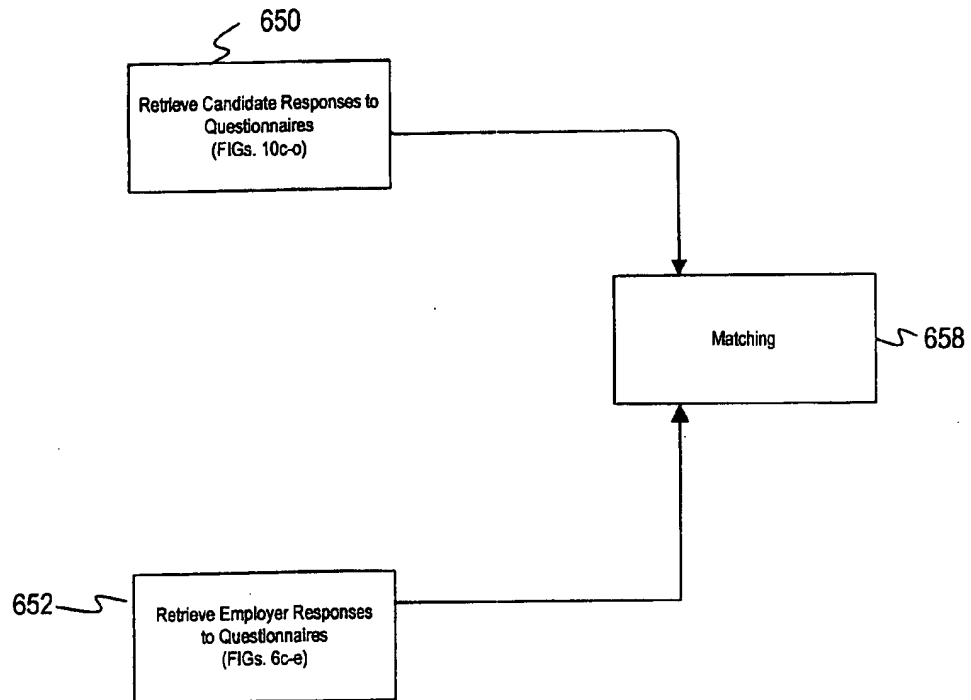


FIG. 28a

Back to a One

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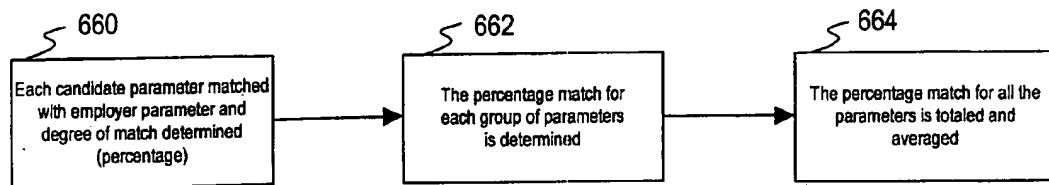


FIG. 28b

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